# **CHRIS HR USERS' MANUAL**

Version 4.4 September 2003 Updated June/2004



**Based on PeopleSoft Version 8.0** 

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# 1 Introduction to CHRIS

The Corporate Human Resource Information System (CHRIS) evolved from a corporate strategic planning process where Department of Energy's human resource (HR) community recognized the need to operate its HR programs more efficiently, reduce paperwork, and eliminate redundant and non-Y2K compliant information systems. CHRIS capitalizes on the latest information technology for meeting the Department's core and priority human resource mission functions.

Effective September 27, 1998, CHRIS became the Department of Energy's official personnel system of record. CHRIS replaced the PERS portion of the DOE's legacy PAY/PERS system. Other than the last official action on or before the implementation date, historical personnel actions were not loaded in CHRIS. Personnel actions can be processed in CHRIS as they are received, regardless of the effective date. Certain payroll-related benefit documents, such as health benefits and Thrift Savings Plan, are processed in CHRIS by the Payroll Office. Personnel data processed in CHRIS is interfaced with the Department's current payroll (PAYS) system. Security access and integrity of CHRIS are supported through the use of user identifications and passwords to prevent unauthorized use of the system and databases. The system incorporates edit and warning messages and validates certain employee data based on tables to ensure data integrity and the accuracy of the personnel actions and reports generated.

Currently, CHRIS is being utilized to process SF-52's and SF-50's. Eventually CHRIS will be used to:

- ⇒ Align core HR needs and practices across the DOE community;
- ⇒ Consolidate personnel data into a single integrated system; and
- ⇒ Provide better information for improved decision making.

### CHRIS will enable:

- ⇒ Managers and supervisors to access real-time personnel data from their desktops;
- ⇒ Managers and supervisors to initiate personnel requests and receive notification of their processing electronically (i.e., SF-52's and 50's will be done on-line);
- ⇒ Enable employees to view and enter their own personal data and make changes to their benefits information;
- ⇒ Provide personnel forms on-line and automate certain notification processes.

### **About this User Manual**

The CHRIS Users' Manual provides the proper procedure and step-by-step instructions for processing personnel actions and performing other related activities in the automated system, such as generating reports and ticklers. This manual should be used as a supplement to the documentation and processing guidance on preparing actions contained in Office of Personnel Management (OPM)'s Guide to Processing Personnel Actions, as well as Departmental and collective bargaining unit agreements. CHRIS HR Bulletins are issued when information needs to be transmitted immediately.

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# 2 CHRIS Basics

# **Contents**

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# 2.1 Key Concepts

# **CHRIS Environment**

The CHRIS database is physically located at the National Energy Technology Laboratory (NETL) in Morgantown, West Virginia. It is accessible to DOE sites across the country through web technology. This technology involves storing the database on a large computer (referred to as the "database server"). Also setup at this site is a system of Application Servers, Batch Servers, Web Servers and a Report Repository. Each site has access via DOENet to the database through the web hitting one of two Web Servers. These Web Servers pass information requests through the Application Server. The Application Server then sends the requests on to the Batch Server or database server for processing. The reporting results get transferred over to the Report Repository for user access via the web. This technology combines the power of main frame computing with the ease and speed of the web. Because PeopleSoft uses Structured Query Language (SQL) when you access the database, you are requesting and receiving only the specific data you need at that time not the entire database.

# **Relational Database**

CHRIS is a relational database built using the PeopleSoft Federal Version 8.0. In its simplest sense, a relational database is a **series of tables linked by key fields.** The advantage of a relational database is that you only have to enter data into a table once and it will automatically populate related fields. This saves time and decreases potential data entry errors.

Tables are the foundation of the database. Each table is **comprised of columns and rows like a spreadsheet**. The columns in each table are the fields you see in pages as you enter data in the program. The rows of the table are the records and contain the entries that you make in each field.

Column (Field)

Row (Record)

Emplid	Name	Street	City	State
100	Rodriquez,Anna	897 Cavalry	Arlington	VT
101	Stream, Daniel	325 Lennon	Rockville	MD
102	Eggert,John	305 Maple	Alexandria	VA

Each table has a unique name and is linked by key fields to create the relational database. Foundation tables are updated by the system administrator only. Whenever you process actions, **you** are actually changing/creating records in the database.

# **Effective Dates**

Rows of data (or records) in a table are effective dated. This means a date is attached to the record that tells the computer and the user **the date the record goes into effect.** 

CHRIS uses three types of dates to manage DOE records:

- ⇒ **Future:** Data rows that have effective dates greater than the system date;
- ⇒ *Current:* The data row with the most recent effective date closest to today's system date—but not a future date. Only one row is the current row; and
- ⇒ *History:* Data rows that have effective dates less than the current data row.

This effective date arrangement provides three benefits to DOE:

**First**, it enables the Department to maintain a complete chronological history of all personnel and position data. With this information at our fingertips, we can roll back the system to a particular time to **perform** analyses. Or we can roll it forward to project the impact of future actions on the organization.

**Second**, the system uses the effective date to determine which records are operational. This means *you* can actually enter actions before they become effective. You just have to be sure to enter the date on which the system should recognize the effective date of the action.

**For example:** In July, you enter information for a promotion that is not effective until September 1 (a future action). On September 1, the system will recognize the action as the current/operational data and the previous record concerning that person becomes the historical record.

Third, you can process more than one action effective the same day.

**For example**, you could enter a promotion and a change in work schedule to be effective the same day and the system will automatically assign a sequence number to each action. It is the user's responsibility to determine the order in which the actions should be processed.

# 2.2 Key Features

# Menus

Menus provide the list of processes and their associated pages. The menus pull down from the menu bar. The types of menus available vary from window to window.

# **Pages**

Each menu option (process) opens into a page. Pages are the screens on which you enter data into the database. They are comprised of fields that:

- ⇒ have been filled in (populated) by data already present in the database;
- ⇒ have valid values available for you to select from a pull down list; or
- ⇒ have blanks for you to insert the appropriate information.

You move between pages by clicking on the scroll bar or the folder tabs along the top of the page.

You must complete all the required fields in a page before it will allow you to save.

# **Field**

A field is the point of data entry on a page. It is comprised of a label and an entry blank. The label references the column of the associated table. The entry blank is where you physically enter/modify data, either by typing or by selecting a valid value from a list.

# Row

A row is a portion of the database in which you enter data to form a record. Each row has an effective date associated with it. It is possible to enter multiple rows in certain fields. **For example**, under the field "Remark CD" you enter a separate row for each remark, i.e., one row for a K16, one row for a K20, etc. You can move between the various rows for that field by using a scroll bar or left and right arrows.

# 2.3 Navigational Techniques and Tips

# **Techniques**

The following are ways to help you get around CHRIS as efficiently as possible. Frequently, there is more than one way to get to where you want to go.

Cursor Simply use the mouse to move the cursor to wherever you want to enter data or select

an item and click. This is not usually the fastest way to navigate; though sometimes it is

the only option.

Tab/Shift+Tab This is the best way to **move between fields on a page**. To move forward, use tab. To

move backward, use shift+tab. Note that options selected from valid value lists or pull down menus may not appear until you have tabbed to the next field. When you use tab to move between fields, the field is highlighted as you move into it, which allows you to

type over existing data.

Save after you have completed an action. If you try to save before the action is complete,

you are likely to get an error message telling you that required fields are missing. You must go back and fill in the required fields before the system will allow you to save.

Scroll Bar Use the scroll bar to move between rows of data for any given field.

Magnifying Glass These appear at the right side of fields. Click on them once and they will reveal a **list of** 

valid values for that field. Use these whenever they are available rather than keying in

the data. Frequently it is faster, and it avoids data entry mistakes.

Advanced Search Enables you to narrow a search by entering more than one search criterion. It provides

fields for you to enter known data that will narrow the options provided in a valid value box. **For example**, if you are trying to locate a record for an employee named Smith and the system has 50 Smiths in it, you can use the *Advanced Search* and enter other data that

will narrow the options so that you don't have to scroll through all 50 names.

New Window To open more than one window, choose "New Window." The window you were

previously working on will minimize at the bottom of you desktop. This option will

allow you to toggle between processes.

Breadcrumbs Display the path used to navigate throughout menu options.

View All Allows you to view multiple rows of data all together as opposed to using the scroll bar

to view multiple rows individually.

 $\langle or \rangle$  Allows you to scroll through a record one transaction at a time

*First* Allows you to view the most recent transaction within a record.

<u>Last</u> Allows you to view the oldest transaction within a record.

+ Used to add a row of data.

- Used to delete a row of data.

Include History Used if you want to view all rows within a record but only want to insert or change

future rows.

Correct History Used to view all history, current & future rows or correct or delete an action with a

PARStatus of REQ.

Date Prompt This is a button next to a date field that presents a calendar with the (current) system date

displayed. You can change the month and year by clicking on the arrows in the calendar.

This option can be used instead of manually typing in a date field.

# **Tips**

### The following are a few reminders to help you along the way.

Preserve Old Records Be sure you insert a new row whenever you enter a change. You do not want to literally

change the data in the pages because you want to preserve the historical record. You want to insert a new row and enter the new information under the new effective date. It's the effective date that determines which record the system uses as the valid current data.

Find a Valid Value If you are having trouble finding a valid value and the pull down list associated with a

field is too long to read through, Click on the magnifying glass. This will bring up a

dialogue box that will help you identify and limit the number of options available.

Tab Between Fields This is the safest way to get around a page. It will also prevent you from skipping over a

required field.

Avoid Typing Whenever the option is available, use the magnifying glass to select valid values. This

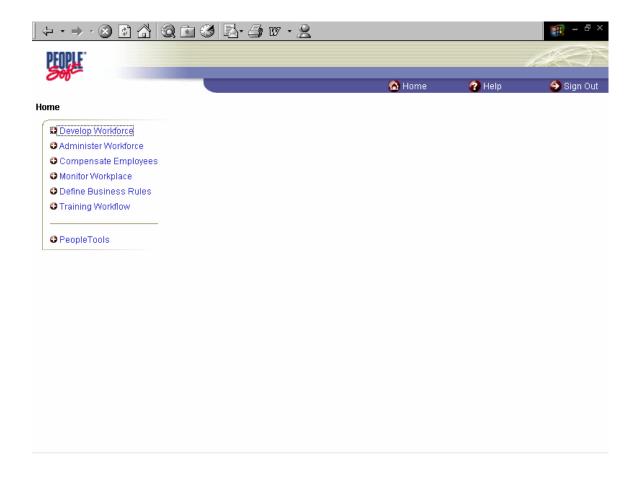
will frequently be quicker than typing and will prevent you from making data entry

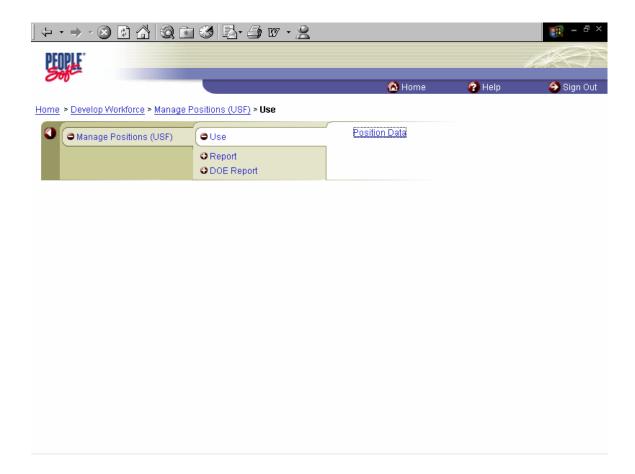
errors.

# 2.4 CHRIS Pages

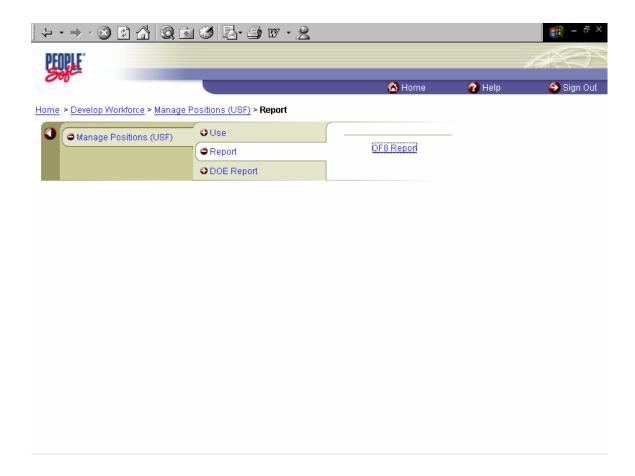
## You will have access to the following menus:

- ⇒ **Develop Workforce**, where you will access **Manage Positions** to create or modify position information.
- Administer Workforce, where you will process all personnel actions, enter employee review and education information, as well as review records.
- ⇒ Compensate Employees, where you will access Administer Base Benefits to view benefit information.
- ⇒ Monitor Workplace, where DOE Reports are listed.
- ⇒ **Define Business Rules**, where DOE Reports are listed
- ⇒ **PeopleTools**, where you run queries and access the Report List for printing.

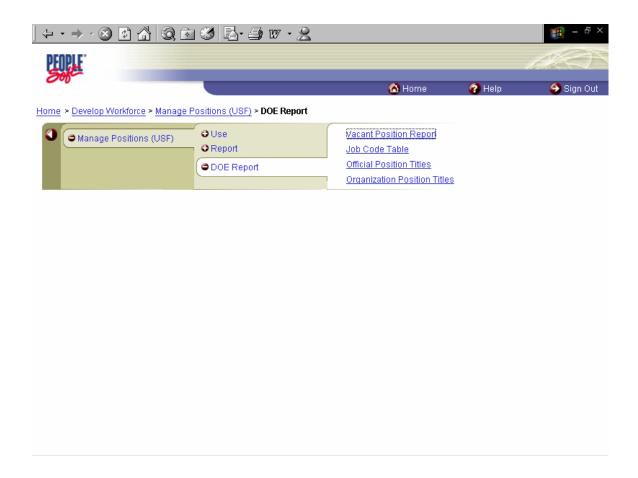




**USE** is where you create or modify position information.

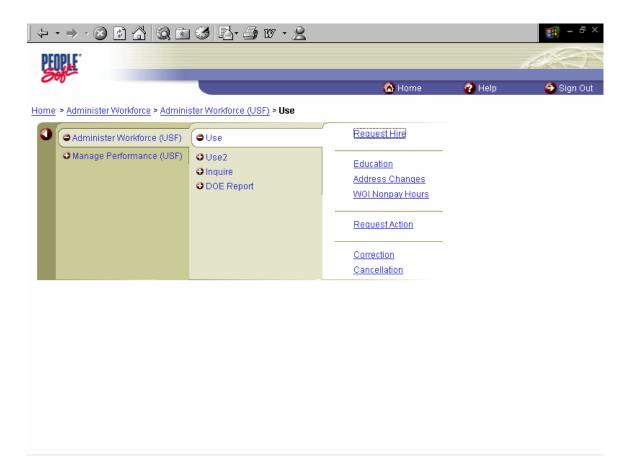


**REPORT** is where you have the option of printing an OF-8.



**DOE Report** is where you may generate the following reports:

- **⇒** Vacant Position Report
- **⇒** Job Code Table
- **⇒** Official Position Titles
- **⇒** Organization Position Titles



The **USE** menu is where you select the process that you want to perform.

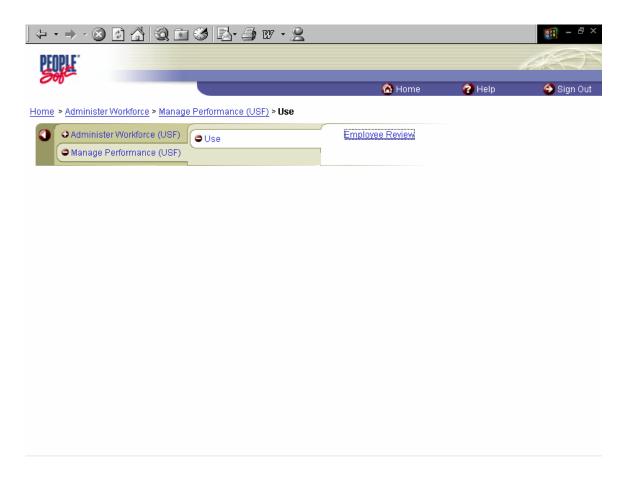
The **Request Hire** option is where you will process new hire actions.

Education is where you will process changes/additions to employees' education information.

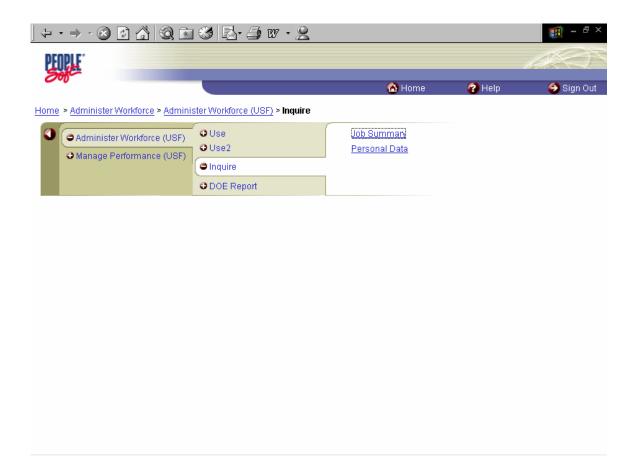
WGI NonPay Hours is where you view nonpay hour balances.

**Request Action** is where all other personnel actions are processed.

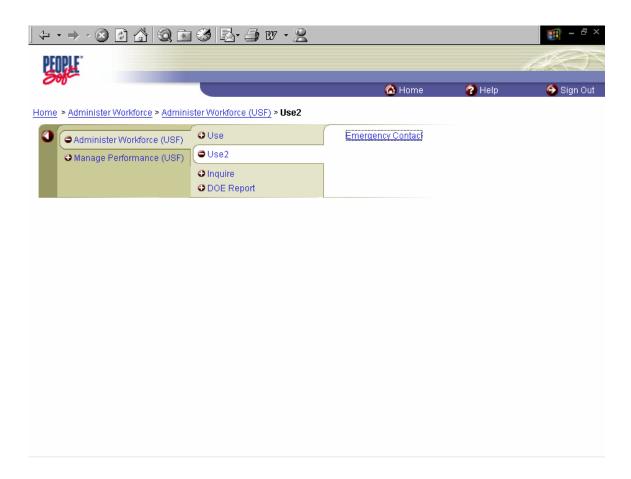
**Correction** and **Cancellation** are the options to process those types of actions.



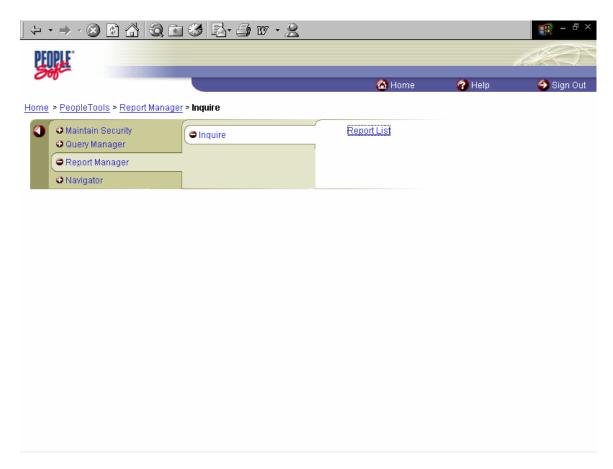
Under Manage Performance, Use, is where you enter *Employee Review* information.



INQUIRE is where you can view Job Summary or Personal Data.



**EMERGENCY CONTACT, Use 2** is where you can view or enter **Emergency Contact** information.



Report Manager is where you view print jobs.

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# 3.1 Position Information

One fundamental aspect of CHRIS is that personnel data is managed by position rather than by employee. In driving the system by position, we attach data to the positions and move employees in and out of those positions. We can use the data specific to each position as the basis for organizational planning, recruitment, and career planning. This is appropriate for Federal positions as the duties, responsibilities, pay and other factors are determined by the position, not the incumbent.

CHRIS positions are not abolished; they can be inactivated when vacated and re-activated if needed at a later date.

### In CHRIS:

- ⇒ **Position** is system assigned. The user will never create this number.
- ⇒ **Job Code** is a number the user selects from a library of Job Codes that are assigned by the CHRIS Functional staff. **The user will never create this number.**

The 15 variables used to identify the Job Code in CHRIS are listed below:

Select only the job codes within your sub-agency.

Personnel Office Identifier
Sub-Agency
Pay plan
Series
Grade
Title
FLSA
Manager Level
Functional Class
Pay Table
Financial Interest
Executive Disclosure (SES, Schedule C, EX, SL, ST, EJ Lvl 5, EK Lvl 5, CA, AL)
Position Sensitivity
Pay Basis
PATCOB

While working in CHRIS, if you discover that the database <u>does not</u> contain a match for the 15 variables you have identified for a position, you must complete the required request form to obtain a new Job Code. This form can be found in this chapter and on the CHRIS Homepage at <u>chris@inel.gov</u>. Once the form is completed and faxed to the CHRIS Functional Hotline, the Job Code will be created in the database and your fax will be returned with the newly assigned Job Code number.

# **How to Inactivate a Position**

After processing an action that moves an employee out of a Position, the Position should be inactivated. Follow the steps below to inactivate the Position.

## Develop Workforce > Manage Positions (USF) > Use > Position Data

- 1. Enter the **Position**.
- 2. Insert a row (+).
- 3. Change the **Effective Date** to reflect one day after or later than the date the position is vacated.
- 4. Change **Status** to "*Inactive*."
- 5. Save.

# **How to Reactivate a Position**

If you are processing an action that moves an employee into an inactive position, you will need to reactivate the position as follows:

## Develop Workforce > Manage Positions (USF) > Use > Position Data

- 1. Enter the **Position**.
- 2. Insert a row (+).
- 3. Change the effective date to reflect the same day that the new action is effected.
- 4. Change **Status** to "Active."
- 5. Change any other data in the position as necessary.
- 6. Save.

# **How to Reuse a Position**

An example of this would be when you are re-using a Position for a career ladder promotion:

## Develop Workforce > Manage Positions (USF) > Use > Position Data

- 1. Enter the **Position**.
- 2. Insert a row (+).
- 3. Change the **Effective Date** to reflect the same day that the new action is effected.
- 4. Change the position as necessary.
- 5. Save.

# **Potential Problems with Assigning Multiple Employees to Same Position**

Currently, there is no edit that prevents a CHRIS user from assigning more than one person to the same 'position'. This practice will negatively impact certain information in CHRIS as well as other related systems. Below are some of the known issues.

### • "Reports to Position" Not Updating Correctly on Personnel Transactions

The CHRIS system has been modified to update/refresh the "Reports to Position" number and the Supervisor's Emplid on the Employment 1 page from the Position Data record as personnel transactions that involve new or refreshed positions are processed. When more than one supervisor is assigned to a Position, there is insufficient information for the system to determine the proper supervisor. These fields are grayed out on personnel transactions and the user cannot update the information manually.

### Mass Processing – Realignments & Change in Organization Name Actions

There is a risk of serious discrepancies in the CHRIS system between the Position Data record and personnel transactions during mass processing of realignments and organization name changes when a Position is shared by two or more employees. Since a position can reside in only one Department ID, some employees may end up without a valid Position Data record following the mass processing. The programs used for mass processing would have to be changed significantly to include extra checks and balances to eliminate the possibility of the discrepancies discussed above.

### • DOE Phone Book – Identification of Department Managers

The CHRIS system provides organization names, organization hierarchy and department managers for the DOE Phone Book. When more than one employee is assigned to the manager's position number for a given Department ID, the system has no way of determining which employee is the current manager. As a result, the DOE Phone Book will contain missing or invalid information.

### • Impact Upon Implementing Future CHRIS Modules

Dual occupancy of positions in CHRIS may also create problems upon implementation of future CHRIS modules such as Recruitment and Succession Planning. The full impact is not known at this time.

It is strongly recommended that a one-to-one relationship always exist between the position and the employee, including an employee serving on a temporary promotion. If you have questions concerning this information, please contact the CHRIS Functional Hotline at (304) 285-1310.

# **Creating a Position**

# Develop Workforce > Manage Positions (USF) > Use > Position Data

Click on "Add a New Value."

Click on **Add** and it will automatically assign a position number when the position is saved.

# **Description**

- 1. The **Effective Date** and **Status Date** will automatically default to the current (system) date. The effective date of the position must be on or before the effective date of the action for which the position is being created.
- 2. The **Reason** defaults to **NEW**-New Position.
- 3. Select the **Job Code** (Click on the magnifying glass to search for variables **Pay Plan**, **Pay Table**, and **Grade** will default from the **Job Code**. When processing retained grade actions, the **Job code** should reflect the position to which the employee is being assigned <u>not</u> the position they came from in the retained grade.
- 4. The **Reports To** field will autopopulate based on the selection of the **Department** once it is entered on the **Work Location** page. If it does not autopopulate, click on the magnifying glass to search for the appropriate Position of the head of the Department or Supervisor of the employee for which the position is being created. If the supervisory position is not yet established, leave the **Reports To** blank. Notify the CHRIS Functional Hotline when the **Department** head/supervisor position is established. If the **Department** head/supervisor position is vacant, but has been established in CHRIS, it must be entered in the **Reports To** field.

### **US Federal**

- 1. Enter Occupational Series
- 2. Enter the **Organization Posn Title Cd** (Click on the magnifying glass to search)
- 3. Enter the **Position Occupied**
- 4. Click on the magnifying class to search for the **Competitive Area** (required field for pay plans GS, GM, AD, EI, EJ, EK, EN, SL, ST, WB, WG, WL, WS). (If you need to have a new area added or an existing area inactivated, contact the CHRIS Functional Hotline.)
- 5. Enter the **Competitive Level** (required field for pay plans GS, GM, AD, EI, EJ, EK, EN, SL, ST, WB, WG, WL, WS).
- 6. **Date Position Established** will default to system date. Change to the date the position was classified.
- 7. If the position is temporary, enter **Not to Exceed Date**

### **□**Work Location

- 1. Enter the **Department**.
- 2. Enter the **Location Code** (Click on the magnifying glass to search).

### **US Federal**

- 1. Enter **Position Location** (default is Headquarters) --- if the position is located in the field, select (Field).
- 2. **Personnel Office ID** and **Sub-Agency** will default based on the selection of the **Job Code**.

## □Job Information

- 1. Enter **Reg/Temp**. (This field indicates the status of the position, not the incumbent of the position.)
- 2. Enter **Standard Hours/Weekly**. The **Standard Work Days** will default based on the **Standard Hours**, do not change.

#### **US Federal**

- 1. Enter the **Bargaining Unit** (default 8888).
- 2. Enter the **Work Schedule**. Once entered the appropriate schedule will default the Full/Part-Time field on the Job Information page.
- 3. Enter the **Fund Source**.
- 4. FLSA Status will default from the Job Code.
- 5. Enter Target Grade.

# **□**Specific Information

### **US Federal**

- 1. Enter Security Clearance.
- 2. Enter **LEO/Fire Position** if applicable, otherwise the SCD for LEO will not ungray on the employee's record
- 3. Click on the checkbox next to: **Seasonal, Drug Test (Applicable), Intelligence Position, Mobility Position, Procurement Integ Posn, Presidential Appt Posn** if any of these are applicable to the position.
- 4. If applicable, click on link **Training Programs** to assign a training program to the position.

# ☐ Return to Description

- 1. Review the **Reports To Posn** field. The **Reports To Posn** field will autopopulate based on selection of **Department**. If it is not populated, click on the magnifying glass to search for the appropriate Position of the head of the department or supervisor of the employee for which this position is being created. If the supervisory position is not yet established, leave the **Reports To Posn** blank. Notify the CHRIS hotline when the department head/supervisor position is established. If the department head/supervisor position is vacant, but has been established, it must be entered in the **Reports To Posn** field.
- 2. Save.
  - If the Reports To position entered is inactive or unoccupied, you will receive the following warning message: "The "Reports To" position identified is not an active and/or occupied position." If you receive this warning, it is recommended that you re-enter a new Position that is active and occupied.
- 3. **Be sure** to make a note of the Position assigned as you will need it to finalize your action.

# **Modifying A Position**

## Develop Workforce > Manage Positions (USF) > Use > Position Data

# **Description**

- 1. Select the **Position**.
- 2. **Insert** a Row (+).
- 3. Enter **Reason**.
- 4. Verify **Status** it may have been inactivated previously and will need to be changed to **Active**.
- 5. **Effective Date** and **Status Date** should be on or before the effective date of the action.
- 6. Review/Change the **Job Code** (Click on the magnifying glass to search for variables **Pay Plan**, **Pay Table**, and **Grade** will default from the **Job Code**.) When processing retained grade actions, the **Job Code** should reflect the position to which the employee is being assigned <u>not</u> the position they came from in the retained grade.
- 7. The **Reports To** field will autopopulate based on the selection of the **Department** once it is entered on the **Work Location** page. If it does not autopopulate, click on the magnifying glass to search for the appropriate Position of the head of the Department or Supervisor of the employee for which the position is being created. If the supervisory position is not yet established, leave the **Reports To** blank. Notify the CHRIS Functional Hotline when the **Department** head/supervisor position is established. If the **Department** head/supervisor position is vacant, but has been established in CHRIS, it must be entered in the **Reports To** field.
- 8. Select Reason.

### **US Federal**

- 1. **Occupational Series** will default from the Job Code.
- 2. Review/Change the **Organization Posn Title Cd** (click on the magnifying glass to search).
- 3. Review/Change the **Position Occupied**.
- 4. Review/Change the Competitive Area (click on the magnifying glass to search).
- 5. Review/Change the Competitive Level.
- 6. Review/Change **Date Position Established**. Enter date the position was classified.
- 7. If the position is temporary, enter **Not to Exceed Date**.

### **□**Work Location

- 1. Review/Change the **Department**.
- 2. Review/Change the **Location** (click on the magnifying glass to search).

### **US Federal**

- 1. Review/Change the **Position Location** (default is Headquarters) if position is located in the field, select (**Field**).
- 2. **Personnel Office ID** and **Sub-Agency** will default based on the selection of the **Job code**.

## □Job Information

- 1. Enter **Reg/Temp**. (This field indicates the status of the position, not the incumbent of the position.)
- 2. Review/Change Standard Hours/Weekly. The Standard Work Days will default based on the Standard Hours, do not change.

#### **US Federal**

- 1. Review/Change the **Bargaining Unit** (default 8888).
- 2. Review/Change the **Work Schedule**. Once entered the appropriate schedule will default the Full/Part-Time field on the Job Information page.
- 3. Review/Change the **Fund Source**.
- 4. FLSA Status will default from the Job Code.
- 5. Review/Change Target Grade.

# **□**Specific Information

### **US Federal**

- 1. Review/Change Security Clearance.
- 2. Review/Change **LEO/Fire Position** if applicable, otherwise the SCD for LEO will not ungray on the employee's record.
- 3. Click on the checkbox next to: **Seasonal, Drug Test (Applicable), Intelligence Position, Mobility Position, Procurement Integ Posn, Presidential Appt Posn** if any of these are applicable to the position.
- 4. If applicable, click on link **Training Programs** to assign a training program to the position <u>or</u> remove/change Training Program if previously assigned to position.

# ☐ Return to Description

- 1. Review the Reports To field. The Reports To field will autopopulate based on selection of Department. If it is not populated, click on the magnifying glass to search for the appropriate Position of the head of the department or supervisor of the employee for which this position is being created. If the supervisory position is not yet established, leave the Reports To blank. Notify the CHRIS hotline when the department head/supervisor position is established. If the department head/supervisor position is vacant, but has been established, it must be entered in the Reports To field.
- 2. Save.
- 3. If the Reports To position entered is inactive or unoccupied, you will receive the following warning message: "The "Reports To" position identified is not an active and/or occupied position." If you receive this warning, it is recommended that you re-enter a new Position that is active and occupied.

# **Job Code Request Form**

Complete form (except for last two grayed columns) and fax to the CHRIS Functional Hotline at (304) 285-0902.

Date of eding	ode	ode					evel	ıs	·y		S	SS		mp Exec N)*	7	CHRIS Functional Staff Only									
Effective Date of Action Needing New Job Code	New Job Code New Job Code	New Job C	New Job C	New Job C	New Job C	New Job C	New Job C	Occu Serie	Occu Serie	Occu Series	Title	Pay Plan	Pay Table	Grade	Manager Level	FLSA Status	Sub Agency	POI	Pay Basis	Func Class	Sensitivity	Spc Gvt Emp Subject to Exec Disc? (Y/N)*	Sch C (Y/N)	Ex Disc [278] (Y/N)	Fin Int [450] (Y/N)
Today's Date:					Requestor Name:																				
Sub-Agency Name:				E-Mail Address:																					
Requestor Phone Number:					Requestor Fax Number:																				

<sup>\*</sup> Special Government Employees (Experts, Consultants, Advisory Committee Members in Pay Plans ED, EE, EF, EG, EH, and EI) are subject to Executive Disclosure if their salary is equal to or greater than 120% of GS-15, Step 1. Otherwise, they are subject to Employee Financial Interests. The on-line job code form is available on the CHRIS website at <a href="http://chris.inel.gov/HR\_Admin/job\_code.cfm">http://chris.inel.gov/HR\_Admin/job\_code.cfm</a> and should be used to ensure accuracy and completeness of the information provided.

# **Request For New Organization Position Title**

Complete form and fax to the CHRIS Functional Hotline at (304) 285-0902.

	Effective Date of Action Needing New Organization Position Title	New Organization Position Title Code	Occup Series	POI	Sub- Agency				
Today's	s Date:		Requestor Name:						
				E-Mail Address:					
Reques	tor Phone Numbe	er:	Requestor Fax Number:	Requestor Fax Number:					

# **Competitive Area\* Request Form**

Review Section 14.31, Competitive Area Code Listing to ensure that your request is not a duplicate of a current Competitive Area Code. Then, complete the form and fax to the CHRIS Functional Hotline at (304) 285-0902.

Sub Agonov	Competitive Area Symbol	Effective Date (based on the order creating the new area or the effective	Competitive Area* Description (limited to 60 characters)
Sub-Agency	(limited to 2 characters)	date of the Sub-Agency)	This should reflect the geographic location where covered employees are assigned.
* Competitive Area. For considered a "local comm		rt of an agency within which	ch employees are in competition for retention. Generally, it is restricted by what is
	NOTE: Before faxing	g to the CHRIS Function	al Team, the form must be signed by the HR POC.
Today's Date:			Requestor Name:
Sub-Agency Name:			E-Mail Address:
Requestor Phone Number:			Requestor Fax Number:
			HR POC Signature:
The on-line competitive used to ensure accuracy	-		site at http://chris.inel.gov/HR Admin/competitive area.cfm and should be

# **Job Code Information**

**Job code:** A number selected by the user to identify the position based on the position description.

When requesting a job code, please <u>fax</u> (do not e-mail) the following information to the CHRIS Functional Hotline. *All the fields must be completed before submitting a job code request*. Before submitting a request for a new Job Code, check the job code table for your Sub-Agency to be sure one does not already exist.

### **Information required with definitions:**

Occ Series Occupational Series

Title\* Official classification title of the position. Standard abbreviation table can be found at the

end of this chapter. The "&" sign is used for "and" on all classification titles. A maximum of 70 characters. \*If organizational title is different from the official title, please

submit "Request for New Organizational Position Title" with this request.

Pay Plan Pay plan for the employee that will be assigned to the position (e.g., GS, GM, EX, ES).

Pay Table Pay table from which employee will be paid (e.g., 0000 for regular GS employees, 0414

for Engineers on the special salary chart): See section of this manual entitled "CHRIS

Terms/Codes" for a complete list of Salary Plans.

**Grade** Grade of the position

Manager Labor Management Relations (LMR) code

Level 2= Supervisor or Manager (PAY/PERS code M & S)

4 = Supervisor (PAY/PERS code L)

5 = Management Official (PAY/PERS code P)

6 = Leader (PAY/PERS code W)

7 = Team Leader (PAY/PERS code T)

8 = All others (PAY/PERS codes C, N, R, X)

FLSA Exempt or Non-Exempt

Exempt:

Professional positions, GS-9 & above

Administrative 2-grade interval positions, GS-9 & above Wage Supervisor (WS), General Foreman & higher

Supervisors, GS-10 & above

Non-Exempt:

Clerical/secretarial positions, GS-8 & below

Professional positions, GS-7 & below

Administrative 2-grade interval positions, GS-7 & below Administrative 1-grade interval positions, GS-8 & below

Technical positions, GS-8 & below

Wage Grade (WG), Wage Leader (WL) & other Wage Board equivalent

positions

Wage Supervisor (WS) and other wage system equivalent positions below the

General Foreman level

There are some positions for which there will be no clear rule to determine FLSA based on pay plan, grade or supervisory status. This must be determined at each individual site.

**Sub-Agency** Two character code for your specific site

**POI** Personnel Office Identifier (4 - 6 digits)

Pay Basis e.g., Per Annum (PA), Per Hour (PH), Per Day (PD)

Func Class Functional Classification code

00 = Not applicable

Use the following codes for scientific and engineering positions only:

11 = Research

12 = Research contract and grant administration

13 = Development14 = Test and evaluation

21 = Design

22 = Construction

23 = Production

24 = Install/Operations/Maint

31 = Data collection, processing & analysis

32 = Scientific and technical information

41 = Standards and specifications

42 = Regulatory enforcement and licensing

51 = Natural resource operations

81 = Clinical practice, counseling, and ancillary medical services

91 = Planning

92 = Management

93 = Teaching and training

94 = Technical assistance and consulting 99 = Other - Not elsewhere classified

**Senitivity** Position Sensitivity

1- Non Sensitive

2- Non-critical, Sensitive

3 - Critical Sensitive

4 - Special Sensitive

5 - Moderate Risk

6 - High Risk

Financial Interest (system-generated): Determine if the employee should

complete the Annual Confidential Financial Disclosure Report. \* Refer to DOE

Order N326.xx issued in September each year.

**Exec Disc** 

Executive Disclosure (system-generated):

- All employees in Pay Plans EX, ES, SL, ST, CA, AL are subject to Executive Disclosure.
- All employees in Pay Plans EJ, EK, and EN in grade level 05 (Pay Band V) are subject to Executive Disclosure.
- All Schedule C employees are subject to Executive Disclosure.
- Special Government Employees (Experts, Consultants, Advisory Committee Members in Pay Plans ED, EE, EF, EG, EH, and EI) are subject to Executive Disclosure if their salary is equal to or greater than 120% of GS-15, Step 1. Otherwise, they are subject to Employee Financial Interests.

-OR-

Sch C

Schedule C Appointments -- CHECK ONLY IF EMPLOYEE IS ON A SCHEULE C APPOINTMENT

When the CHRIS Functional Hotline receives the request, the new job code will be assigned and the form will be returned with the newly assigned job code.

6/2004 3.1-13

# **Abbreviations**

Abbreviations in CHRIS are to be used in cases where the title exceeds the total field length of 70 characters.

(OA) (Office Automation)
 (Steno) (Stenography)
 (Typing) (Typing)
 Acctg Accounting
 Admin Administration

**ADP** Automated Data Processing

Adv Advisor Associate Assoc Assistant Asst Auto Automated Benefits Ben Bio Biological Building Bldg Chem Chemical Class Classification Comm Communications Comp Computer Compliance

ComplComplianceConsvConservationContrContractorCoordCoordinatorCorrespCorrespondenceCrftsmnCraftsman

**DADS** Deputy Associate Deputy Secretary

DepDeputyDeptDepartmentDeptlDepartmentalDirDirectorDistDistributionDivDivision

DNFSB Defense Nuclear Facilities Safety BoardECC Emergency Communications Center

**EEO** Equal Employment Office

Electric Elec Elecl Electrical **Empl Employee Emplmt** Employment Eng Engineer Environment Env Envl Environmental **Equip** Equipment

**ES&H** Environmental Safety and Health

Exec Executive
Fac Facility
Facts Facilities
Fin Finance

Gen General
Haz Hazardous
Hlth Health
Ind Industry
Inds'l Industrial
Info Information

Inst Instrument/Instrumental

Instl Instructional Intergov Intergovernmental Int'l International Jman Journeyman Lab Laboratory Labr Laborer Main Maintenance Mats Materials Mechanic Mech Mechl Mechanical Mgmt Management Mgr Manager Miscellaneous Misc National Nat'l

**NEPA** National Environment Policy Act

Nuc Nuclear Ofc Office Ofcr Officer Opng Operating Ops Operations Pers Personnel Phys Physical Pol **Policy** Prgm Program **Prgms Programs** Prin Principal

**Proc** Process/Processing

Proj Project
Prop Property
Prot Protection
Pwr Power

**R&D** Research and Development **Refrig** Refrigerator/Refrigeration

Reg Regulatory Rel Relations Rep Representative Repro Reproduction Res Resources Sci Science Sec Secretary Spec Special **Spect** Specialist Senior Sr Stabilization Stabil

StafgStaffingSupvSupervisorySvcServiceSvcsServicesSysSystemsTechTechnology

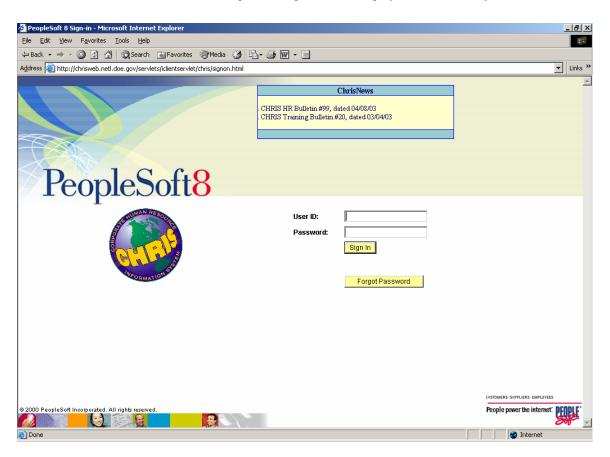
Tech Technology
TQM Total Quality Management

Train Trainee Trng Training

# 3.2 Basic Operations/Functions

# **How to Log On**

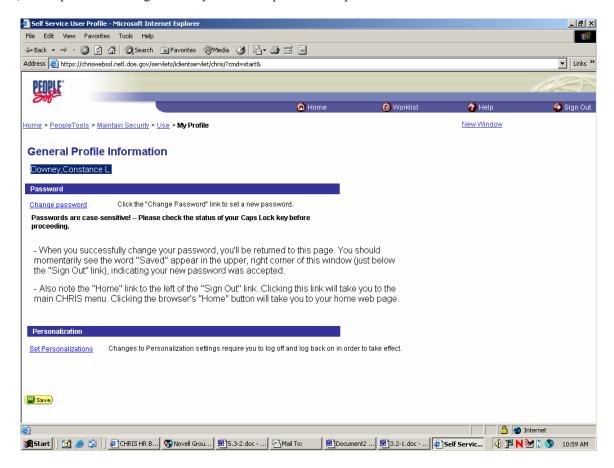
- 1. Using your Internet browser enter the following URL to connect to CHRIS: <a href="http://chrisweb.netl.doe.gov/servlets/iclientservlet/chris/signon.html">http://chrisweb.netl.doe.gov/servlets/iclientservlet/chris/signon.html</a>.
- 2. It is recommended that you add this URL to your favorites so that you do not have to enter the URL each time you log on to CHRIS.
- 3. You will be required to change your password the first time you log on, and every 180 days thereafter. Before logging into CHRIS, please review the DOE-wide password protocol in the section of this manual entitled "How to Change Your Password."
- 4. Log on to CHRIS with the userid and password provided.
- 5. If you have forgotten your password, click on "Forgot Password." An e-mail is then sent to the CHRIS Security Administrator who will respond via e-mail with a new password. User ID accounts are locked out after five failed logon attempts, whether failed attempts occur the same morning or spread out over several days. Once locked, it stays locked until the Security Administrator is notified, usually via the Forgot Password button, to reset the password. When your account is locked you will receive an e-mail notice that it's been locked.
- 6. "CHRISNews," located at the top of the logon screen, displays user community news and information.



# **Personalization Options**

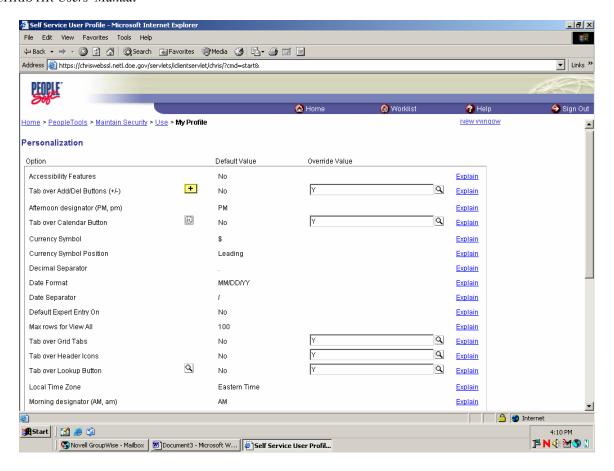
Several CHRIS window navigation options are now available for use by HR, Training, and Manage Competencies users. In addition to the "Change Password" link, near the bottom of the "My Profile" page, is a link for "Set Personalizations."

To navigate to set your personalizations, follow this menu path: *Home > PeopleTools > Maintain Security > Use > My Profile*. The "Set Personalizations" page consists of a list of options, their default values, and at the end of each line, an "Explain" link that gives a very brief description of the option.



There's also an "Override Value" column. This column has a lookup button for options available for personalization. There are several options available, but this page was made accessible primarily to take advantage of the "Tab over..." options. Using the Tab key with the default values set, you'll see that the tab stops on most items, such as Lookup, Calendar, Add/Delete, and Save buttons. Overriding the default value of these options will cause the tab to skip over the item specified in the option name, e.g., "Tab over Lookup Button." The tabbed-over item remains mouse-click available.

To override a default option, click on the Lookup button and select the "Override Value," i.e., if the default value is "No," select "Yes" as the override option. Click the "OK" button at the bottom of the page to save your changes. The changes will not take effect until you log out of and back into CHRIS.

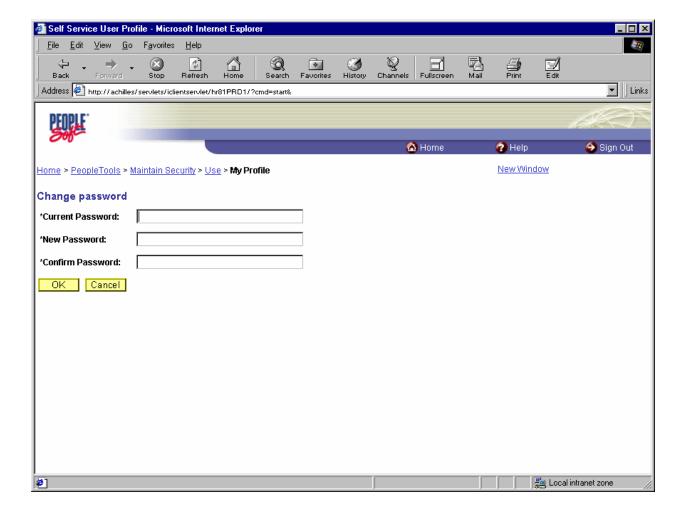


# **How to Log Off**

Click on **Sign Out** in the upper right hand corner of the screen. It is **IMPORTANT** that you click on sign out instead of closing all open windows.

## **How to Change Your Password**

- Logon to CHRIS using your existing password.
- Follow the "breadcrumbs" or links to **PeopleTools > Maintain Security > Use > My Profile**.
- Click on Change Password.
- Enter your current password, then enter and confirm your new password.
- Click **OK**.
- Click Save.



#### **Password Construction**

- Password contains a minimum of eight non-blank characters. CHRIS allows a maximum of 32 characters.
- Password contains a combination of letters (preferably a mixture of upper and lowercase), numbers, and at least one special character. CHRIS allows use of upper- and lower-case letters, and these special characters:

- Password contains a nonnumeric in the first and last position.
- Password does not contain the user ID. <u>Note</u>: In CHRIS, the "Allow password to match User ID control enables administrators to make sure users don't use their own User ID as a password. This helps to prevent hackers from 'guessing' passwords based on a list of employee names."
- Password does not include the user's own or, to the best of his/her knowledge, close friends or
  relatives names, employee serial number, Social Security number, birth date, phone number, or any
  information about him/her that the user believes could be readily learned or guessed.
- Password does not, to the best of the user's knowledge, include common words, that would be in the English dictionary, or from another language with which the user has familiarity.
- Password does not, to the best of the user's knowledge, employ commonly used proper names, including the name of any fictional character or place.
- Password does not contain any simple pattern of letters or numbers, such as "qwertyxx" or "xyz123xx."
- Password employed by the user on his/her unclassified systems is different than the passwords employed on his/her classified systems.

#### Password Protection

- Do not share passwords.
- Do not leave passwords in a location accessible to others or secured in a location whose protection is less than that required for protecting the information that can be accessed using the password.
- Change your password *immediately* upon receipt from the CHRIS security administrator.
- Change your password *at least* every 6 months.
- Do *not* share your password; but if circumstances otherwise dictate, change your password *immediately* after sharing.
- Change your password as soon as possible, but within 1 business day after a password has been compromised, or after one suspects that a password has been compromised.
- Change your password on direction from management.

#### **Password Controls in CHRIS**

- Passwords are set to expire every 180 days. Users who use CHRIS regularly may be warned about the expiration for three days before their password expires.
- After five failed logon attempts, the user's account will be automatically disabled. Contact the CHRIS Security Administrator via e-mail to <a href="mailto:chrissecurity@netl.doe.gov">chrissecurity@netl.doe.gov</a> to get the account enabled.
- Passwords are not permitted to match User IDs.
- Passwords require at least one special character and one digit (0-9).

#### Password Examples

- A#U14GJO
- J\$IK8LOO

### **How to Save**

- 1. Enter all required data to process an action.
- 2. *Carefully review each page and subpage*. Check default values and make sure changes were made as appropriate.

3. Click on the **Save**. You will receive confirmation with the word "Saved" at the top right hand side of the page.

### **How to Print an SF-52**

#### Administer Workforce > Administer Workforce (USF) > Use > Request Action

- 1. With the desired record open, click on the button titled "Print SF-52" on the Data Control page.
- 2. Go to *Home > PeopleTools > Report Manager > Inquire > Report List* and scroll to the right side of the page and click on **Refresh** until you see *View* appear next to your report.
- 3. Click on View. A report log will open displaying the PDF file for your form.
- 4. Record the **Process Instance number**.
- 5. Maximize the **Report/Log Viewer** page.
- 6. Click on the report with the **PDF file** extension and this will open **Adobe Acrobat** and display your output.
- 7. Click on the **printer icon** on the Adobe Acrobat tool bar and a Print display will appear.
- 8. Uncheck all boxes under the **Copies and Adjustments** area so that the forms print properly.
- 9. Click **OK** and the form will be sent to the printer.

### **How to Print an SF-50**

SF-50s can only be printed on actions with a PAR status of PRO.

#### Administer Workforce > Administer Workforce (USF) > Use > Request Action

- 1. With the desired record open click on the button titled "Print SF-50" on the Data Control page.
- 2. You have the option of printing all four copies or a combination of copies. Select or deselect by clicking on the radio buttons and click **OK** to exit the page.
- 3. Go to *Home > PeopleTools > Report Manager > Inquire > Report List* and scroll to the right side of the page and click on **Refresh** until you see *View* appear next to your report.
- 4. Click on *View*. A report log will open displaying the PDF file for your form.
- 5. Record the **Process Instance number**.
- 6. Maximize the **Report/Log Viewer** page.
- 7. Click on the report with the **PDF file** extension and this will open **Adobe Acrobat** and display your output.

Single-Side Printing (Use to print any copies of the SF-50 if printer does not perform duplex printing.)

- 1. Click on the **printer icon** on the **Adobe Acrobat** tool bar and a Print display will appear.
- 2. **Uncheck** all boxes under the **Copies and Adjustments** area so that the forms print properly.
- 3. Click **OK** and the form will be sent to the printer.

**Reminder**: If you are printing/distributing the Employee Copy of the SF-50, the employee must be provided the Notice to Employee information that customarily prints on the reverse side of the SF-50.

**Duplex Printing** (To print the Notice to Employee on the reverse side of Employee copy of the SF-50.)

- 1. Click on the **printer icon** on the **Adobe Acrobat** tool bar and a Print display will appear.
- 2. Select **Properties** from the **Adobe Acrobat** print page.
- 3. Click on **More Options** in the lower left corner of the Paper tab. Clicking on **Properties** may display a **Page Setup** tab on some machines.

- 4. Click on Flip on Long Edge or Long Side.
- 5. Click **OK** to exit More Options page or Page Setup tab.
- 6. Click **Apply** to save change (this step is not required if exiting Page Setup).
- 7. Click **OK** to exit Properties page (this step is not required if exiting Page Setup).
- 8. In the Print Range section, click on **Pages from**: and enter 1 to: 2.
- 9. Click **OK** and the form will be sent to the printer. The Employee copy of the SF-50 should print on the front side of the page and the Notice to Employee should print on the back side of the page.
- 10. Click on the **printer icon**.
- 11. Select **Properties** from the **Adobe Acrobat** print page.
- 12. Click on **More Options** in the lower left corner on the Paper tab. Clicking on **Properties** may display a **Page Setup** tab on some machines.
- 13. Click on None.
- 14. Click **OK** to exit More Options page or Page Setup tab.
- 15. Click **Apply** to save change (this step is not required if exiting Page Setup).
- 16. Click **OK** to exit Properties page (this step is not required if exiting Page Setup).
- 17. In the Print Range section, click on Pages from: and enter 3 to: 5.
- 18. Click OK.

The OPF, Payroll, and Utility copies of the SF-50 should each print on a separate page.

# **How to Print the Reverse Side of the SF-50 Without Using Duplex Printing**

- Select Properties from the **Adobe Acrobat** print page.
- Select More Options on the Paper tab.
- Click on "Flip on Long Edge."
- Click **OK** to exit More Options page.
- Click **OK** to exit Properties page. (Remember to turn off "**Flip on Long Edge**" option before printing other copies of the SF-50 or reports.)
- Click **OK** and the form will be sent to the printer.

## **How to Delete an REQ Action**

#### Administer Workforce > Administer Workforce (USF) > Use > Request Action

- 1. At "Find an Existing Value" page, enter EMPLID and click correct history box.
- 2. Open desired record.
- 3. With the REQ Action on your screen, Press (-) to delete the row.
- 4. Save.

# **How to Change PAR Status**

#### Administer Workforce > Administer Workforce (USF) > Use > Request Action

- 1. Click on Correct History.
- 2. On the **Data Control** page, change **PAR Status** to PRO.
- 3. Save.

### How to Print an OF-8

The **OF-8 (Position Description Cover Sheet)** is a report based on the position information that was built for the position under "Manage Positions" in CHRIS.

#### Develop Workforce > Manage Positions (USF) > Report > OF-8

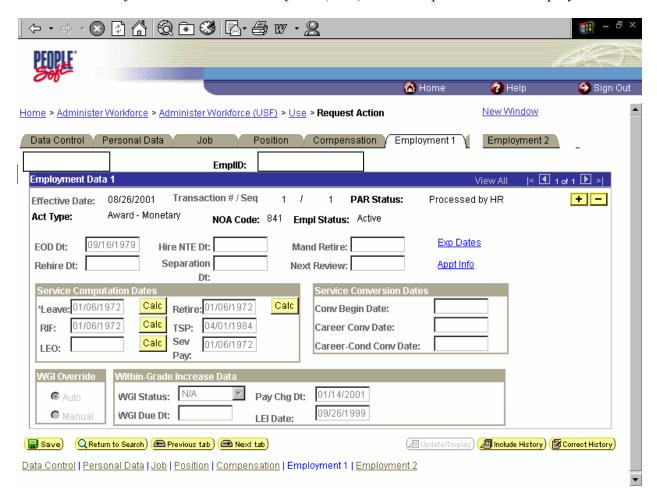
- 1. Select Add a New Value the first time only; thereafter, use Update/Display.
- 2. Enter "OF-8" in **Run Control ID** the first time only, thereafter, select "OF-8."
- 3. Click **Add**.
- 4. Enter the **Position Number** for which you would like a printed **OF-8**.
- 5. Enter the **As of Date.** Date must be on or after effective date of position that was created.
- 6. Save
- 7. Click on Run. When the Process Scheduler Request screen appears, select Server Name: PSNT.
- 8. Verify under **Process List** that the **Type**: Web and **Format**: PDF.
- 9. Click **OK**.
- 10. Record the process instance number.
- 11. Click on **Report Manager** and scroll to the right side of the page and click on **Refresh** until you see **View** appear next to your report.
- 12. Click on View.
- 13. Maximize the **Report/Log Viewer** page.
- 14. On the **Report/Log Viewer** page click on the report with the **.PDF** extension.
- 15. Adobe Acrobat will open and display your output.
- 16. Click on the printer icon on the Adobe Acrobat tool bar and a Print dialog box will appear.
- 17. Check to make sure that all boxes under "Copies and Adjustments" area are unchecked so the form prints properly.
- 18. Check **OK** and the form will be sent to the printer.

**REMEMBER**: This is only a report -- there is no way to add or modify the data on the OF-8.

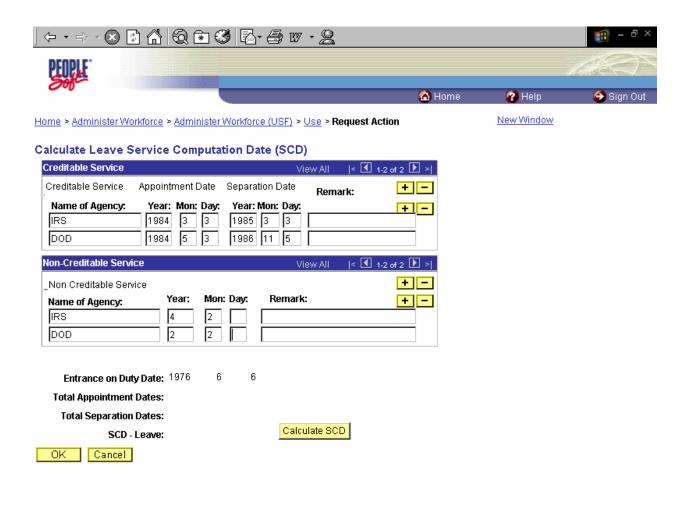
## **Using the SCD Calculator**

<u>NOTE</u>: This process should only be used on a Hire action, NOA Code 966, NOA Code 002 or NOA Code 882 Change in SCD. This calculator can only be used while the action is in a PAR status of REQ. At no other time should the SCD dates be changed.

Administer Workforce > Administer Workforce (USF) > Use Request Action > Employment 1

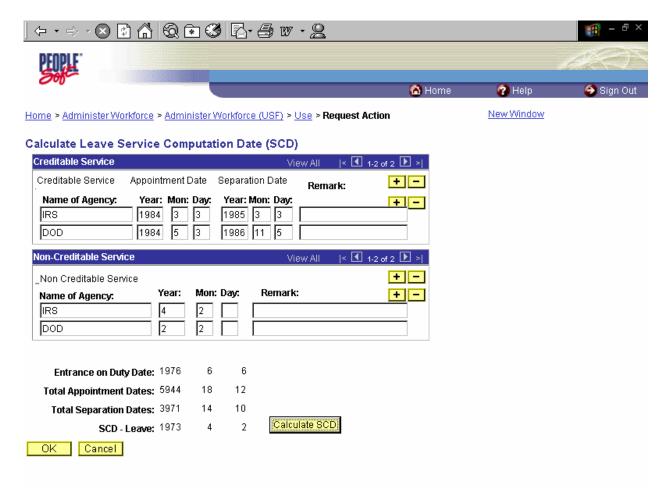


Depending upon which SCD date you wish to calculate, press the "Calc" button next to the desired SCD date to calculate a new SCD.



<u>Note</u>: In order to change, delete or insert additional creditable or non creditable service, the record CANNOT have a PAR status of PRO. The PAR status can only be REQ or COR (NOA Code 002).

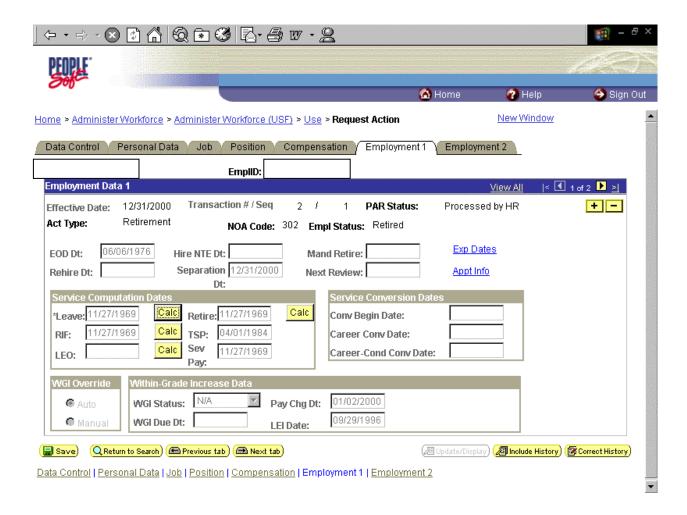
To add more than one period of service for Creditable and Non Creditable Service, press (+) to insert a new row for each of those periods. Once all the service history has been entered, press the "Calculate SCD" button to calculate the new SCD date. Make a note of the newly calculated SCD from this page.



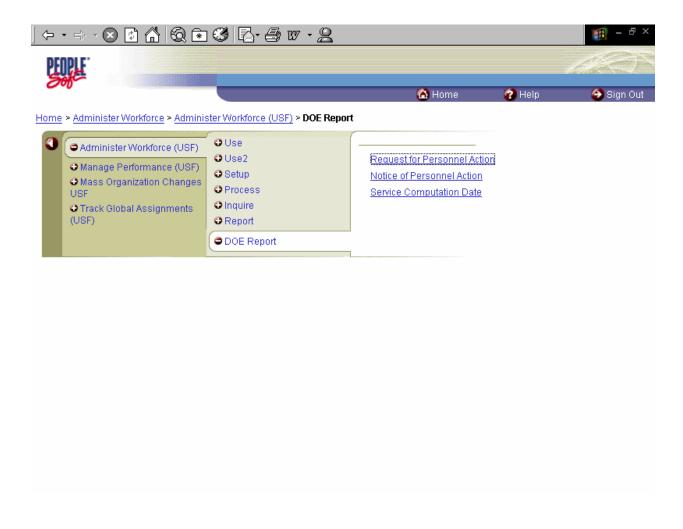
Then press the "OK" button to return to the Employment 1 page.

<u>Note</u>: Any time a change is made to an effective date of a hire action or creditable and non creditable service periods, you will have to again press the calculate SCD button for correct SCD date(s).

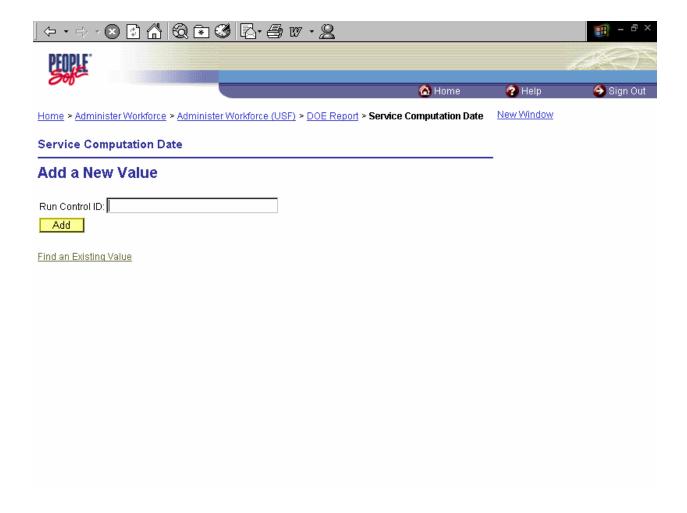
Now, you can enter the new calculated SCD date in the appropriate SCD field and save the record.



After saving a record in a PAR Status of PRO, you can print out the Service Computation Date report from the DOE Reports menu option for whichever SCD date you re-calculated.

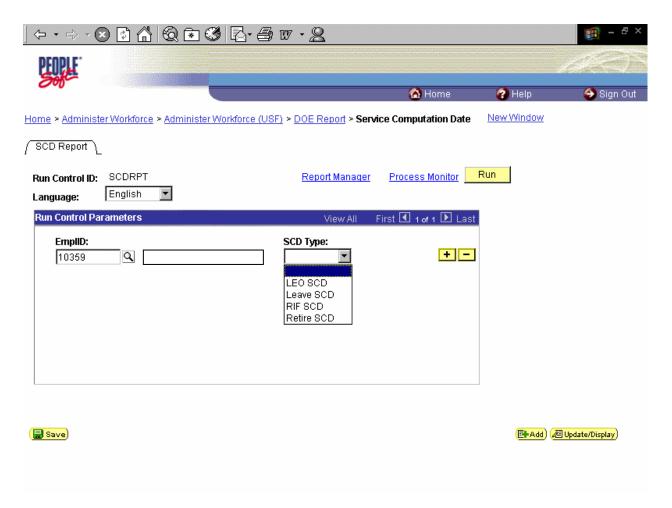


#### Administer Workforce > Administer Workforce (USF) > DOE Report > Service Computation Date



 $Enter\ a\ \textbf{Run}\ \textbf{Control}\ \textbf{ID}\text{:}\ "SCDRpt,"\ Click\ \textbf{Add}.$ 

(You will only have to add a Run Control the first time you generate an SCD report. Every time after you can use the run control you initially created "SCDRpt".)

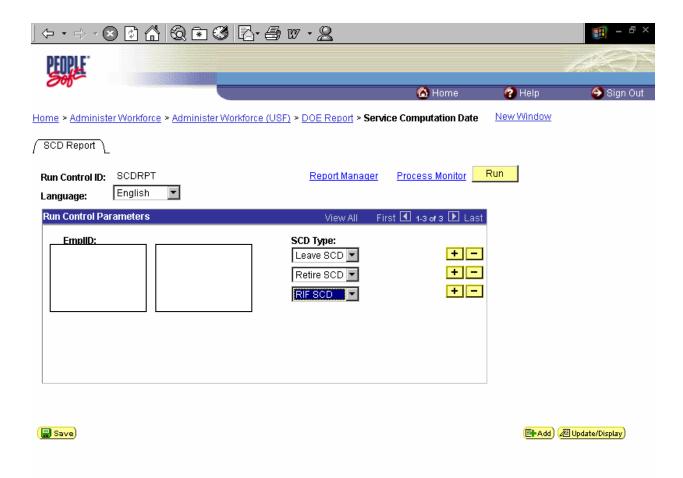


Enter the Emplid of the employee for whom you just calculated a new SCD.

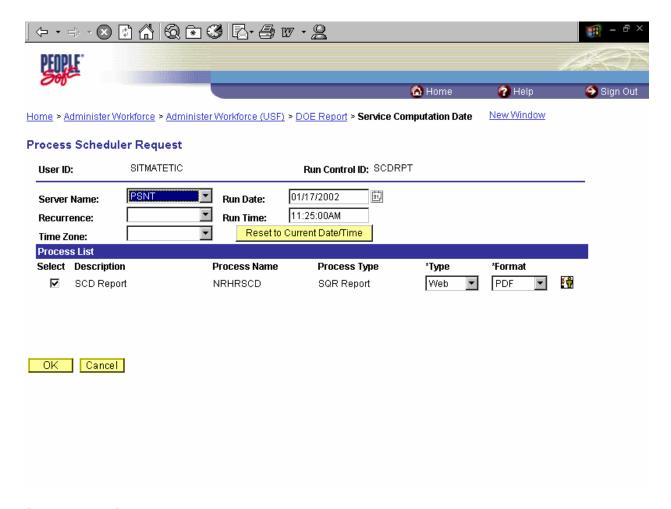
Select the SCD Type by using the down arrow to select the report you wish to generate.

Press (+) to insert a new row for each report you wish to generate.

You will receive a one page report for each SCD Type you select. You cannot generate an SCD report for a future dated action.



**SAVE**. Click on **RUN** to execute the report. <u>Note</u>: Remember that if you did not do a calculation for each of the selected SCD Types there will be no pertinent information on the report. You should only print reports for the SCD's you calculated on the Employment 1 page with a new SCD date.



Server Name: PSNT

Type: Web

Format: PDF

Follow the printing procedures in Section 10 of this manual entitled "Printing from Adobe Acrobat 5.0."

## **How to Make Inquiries**

- 1. Choose **Inquire** from the menu and select either **Job Summary** or **Personal Data**. A lookup dialogue box will appear.
- 2. Select employee and click **OK**. The information you requested will appear.
- 3. When you are finished viewing the information, click the Cancel button on the toolbar.

## How to Find a Job Code on a Position Data Record

- 1. Place the cursor on the **Job Code** field.
- 2. Click on the magnifying glass.
- 3. Type the **Salary Grade**, **Pay Plan**, **Occupational Series**, and **Official Position Title**. It is not necessary to type all of these variables. This process will narrow the search to find the correct Job Code
- 4. Select the **Job Code** from the valid values list that corresponds to the variables of the position you are creating/modifying. Double click on the correct job code, and it will appear in the **Job Code** field.
- 5. If there is no **Job Code** where all 15 variables match, use the request form so that it can be added to the database and you can continue with the action. The request form can be found in the "*Position Information*" section.

## **How to Enter Names And Dates Correctly**

Names: Enter all names in upper and lower case format.

<u>NOTE</u>: The Name consists of 4 separate fields: First Name; Middle; Last Name; Suffix. If the employee has a middle name, enter the middle name or middle initial in the Middle field. **If the employee has no middle name, enter NMN**, as required by OPM's Guide to Processing Personnel Actions, Chapter 3, Subchapter 1-2.

**Dates:** CHRIS uses the following format for dates:

#### MM/DD/YYYY:

The program automatically inserts slashes.

# **How to Verify an Address**

#### Administer Workforce > Administer Workforce (USF) > Inquire > Personal Data

- 1. Enter **Emplid** of employee whose address you are verifying.
- 2. View address. No changes can be made because CHRIS is no longer the system of record for addresses.

<u>Note</u>: CHRIS is not the official system of record for address information. Contact your payroll representative for information on address changes.

# **How to Enter Emergency Contact Information**

Administer Workforce > Administer Workforce (USF) > Use2 > Emergency Contact

#### **□**Contact Address/Phone

- 1. Select employee.
- 2. Enter Contact Name.
- 3. Enter **Relationship to Employee**.
- 4. Check **Primary Contact** box if applicable.
- 5. Check **Same Addr/Home Phone as EE** box, if applicable. Once box is checked address information will autopopulate for the employee's record.

#### **□Other Phone Numbers**

- 1. Enter **Phone Type**. If more than one **Phone Type**, insert row (+).
- 2. Enter **Phone**.
- 3. Save.

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## **How to Enter Remarks**

Be sure to enter all necessary remarks. It is **IMPORTANT** that remarks appear on all NOA Code "002" and "966" actions.

On this page, you will enter the required remarks by typing the pertinent remark code in the field **Remark CD**. Press tab and the remark text will appear in the lines below.

- ⇒ If the remark appears with "\*\*\*\*\*\*\*," you must fill in the relevant information. Highlight the "\*\*\*\*\*\*\*," press delete and type in the appropriate information.
- ⇒ To find a specific **Remark CD**, click on the magnifying glass to narrow your search by typing the first three characters of the **Remark CD** or by typing the first word or a few words of the remark. A valid value list will appear from which you can select the remark.
- ⇒ If the action requires more than one remark click on (+) to add the next remark. Use the left < and right > arrows at the top right hand corner of the remark page to view the remarks.
- ⇒ There is no limit to the number of remarks you can enter.

## **Employees Subject to a Salary Cap**

Adjusted Basis Pay has been redefined as the maximum adjusted rate of basic pay after taking into account all pay caps that may be applicable. This means that Adjusted Basic Pay (Blocks 12C and 20C) will reflect the capped salary if the employee's basic pay plus locality adjustment would exceed the cap.

Locality Adjustment (Blocks 12B and 20B) will be derived by subtracting basic pay from the capped adjusted basic pay (Blocks 12C and 20C).

Total Salary (Blocks 12 and 20) will include the amount of adjusted basic pay plus any AUO, availability pay, retention allowance or supervisory differential after taking into account all pay caps that may be applicable.

For employees on Grade Retention, Total Salary (Blocks 12 and 20) will be shown in relation to the pay basis for the pay plan under which the employee is paid. Currently, SF-50 and CPDF instructions require that pay be shown in relation to the pay basis for the position the employee is occupying. For example, this change would impact employees with retained grade who are either occupying a GS position (pay basis: per annum) while being paid under a wage system (pay basis: per hour) or who are occupying a wage system position while being paid as a GS.

# **Processing Multiple Actions with Same Effective Date for an Employee**

#### Administer Workforce > Administer Workforce (USF) > Use > Request Action

The system will automatically assign a **Sequence Number** if more than one action is processed with the same effective date. The **Sequence Number** field is found on the **Data Control** page. You must determine the order in which to process the actions so that the employee's record reflects them in the proper sequence.

When an employee is entitled to multiple pay benefits simultaneously, the actions must be processed in the order that gives the employee the maximum benefit. For example, when a promotion and within grade increase are effective the same day, check the **WGI Due Dt** before inserting a row to process a promotion action. If the **WGI Due Dt** is the same date as the promotion, process the promotion after the automatic WGI process runs then establish a new position before processing the promotion. If the WGI is not processed during the automatic process, it must be entered manually.

Establish a new position (using another existing job code or request a new job code) for use in processing the second action;

#### or

Determine if there is an existing position which is different from that to which the employee was assigned in the first action which can be used in processing the second action.

(Remember to inactivate the old position by inserting a new row on the position data record with an effective date one day after the effective date of the promotion.)

NOTE: Two awards with the same NOAC, with the same effective date cannot be processed.

# **Entering an Action that Follows a Cancellation**

The system will not allow a row insert if a NOA Code "001" Cancellation action is the top row of a record. Scroll to the row below the cancellation to insert the row. In order to insert the new row, you must check Correct History. After the necessary action is then processed, exit out of the record. Again retrieve the record, and notice that the system re-sorted the action in the appropriate effective date order.

## **How to Process Intervening Actions**

An intervening action is a personnel action which has an effective date earlier than the effective date of the most recent personnel action already processed for a given employee. When entering an intervening action, which involves any change to the position, employment, or job information, the changes effected by the intervening action **<u>PO NOT</u>** automatically update the subsequent actions that are resident in CHRIS. To enter an intervening action you must use the following path:

#### Administer Workforce > Administer Workforce (USF) > Use > Request Action

When processing a NOA Code "002" Correction, the system will prompt you to review subsequent actions to determine if additional corrections are needed. *There is no prompt* when you insert a row to process an intervening action. In order to insert the new row, you must check **Correct History** on the bottom of the screen and scroll the row below the cancellation action. Insert your row here.

Once the intervening action has been processed, you must remember to review all subsequent actions and, if necessary, process either a NOA Code "002" or "966" action, as appropriate, for each action with an effective date greater than the effective date of the intervening action.

**For example**: If you failed to process a WGI for an employee that was due a month ago, and a Reassignment has already been processed for the current pay period, the WGI action must be processed as an intervening action. Once the WGI is entered in CHRIS, the employee's step and salary on the Reassignment action must be updated via a NOA Code "002" Correction.

If an intervening action is processed and one or more award actions were subsequently processed, you must contact the CHRIS Functional Hotline and request that the subsequent award actions be refreshed. This refresh must be done so that the subsequent award actions reflect the changes that were made to the record as a result of the intervening action. This refresh must be done the same day the intervening action is changed from an "REQ" to a "PRO" PAR Status.

## **Understanding the Reviewed Flag**

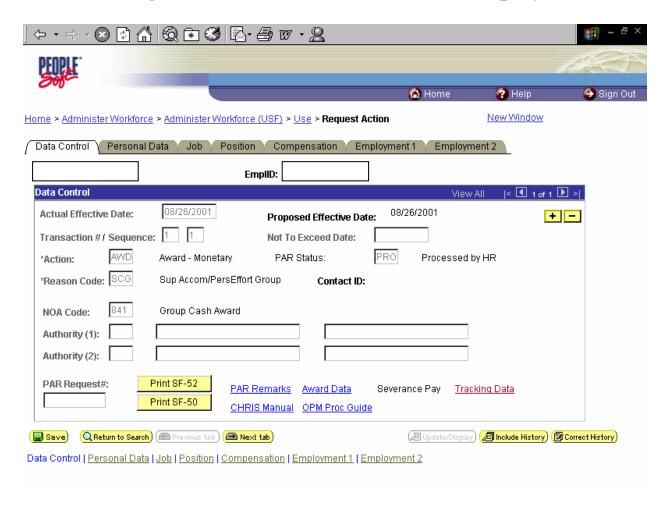
When processing a NOA Code "002" Correction on an action with an effective date earlier than the most recent action, the following message will appear upon saving the action: "You must review records effected by changes and check the Review Performed Flag before saving."

Before the system allows you to save the action, it requires you to scroll to review subsequent actions and place a check in the **Reviewed** check box in the upper right hand corner of each subsequent action before you can save the NOA Code "002" Correction action.

By checking the **Reviewed** checkbox on each row, it does **not** give you the opportunity to make changes to those actions, **nor** does it automatically correct the field(s) that were changed by the NOA Code "002" Correction action.

The purpose of the **Reviewed** checkbox is to give you the opportunity to review each subsequent action and make a determination as to whether or not the field(s) changed on the NOA Code "002" Correction action also need to be corrected on all subsequent rows as well.

# How to Access the CHRIS Users' Manual and OPM Guide to Processing Personnel Actions Within an Employee Record



**CHRIS Manual Link**: This can be used to access the web version of the CHRIS Users' Manual for quick reference while processing an action. When you click on this link, you will automatically connect to the HR/TR Users section of the CHRIS homepage.

**OPM Proc Guide Link**: This can be used to access OPM's electronic version of the Guide to Processing Personnel Actions for quick reference while processing an action.

## **How to Enter/Update Education Information**

You may store multiple rows of education data in CHRIS. Enter additional rows by inserting a new row (+). It is not necessary to insert education information by effective date or degree order. When the action is saved, the system will resort the education information from lowest to highest education level. To view the updated information in the proper sort order, you must exit the record (click on **Use** and re-enter the emplid to view the record with the revised education information).

CHRIS will not allow duplicate education records for the same education level and year. **For example**, if an employee has completed a bachelor's degree with a dual major in the same year, you will be able to enter only one major. Ask the employee to select which major to enter in CHRIS.

When an education level which represents less than a full degree (i.e., 01, 02, 03, 05, 07, 08, 09, 11, 12, 14, 16, 18, or 20) is present in CHRIS and an employee completes a higher education level, these rows of data may be deleted or changed in CHRIS to represent the higher education level acquired. All degrees, as well as the highest education level for less than full degrees, should remain in CHRIS.

#### Examples:

Employee has <u>one</u> education record in CHRIS with level "11-Three years of college." The employee acquires level "13-Bachelor's degree." The education record with code "11-Three years of college" should be updated to reflect appropriate information for code "13-Bachelor's degree." You cannot delete the only education record in CHRIS, but you can update that row of data.

Employee has <u>two</u> education records in CHRIS, one with level "13-Bachelor's degree" and one with level "14-Post-Bachelor's." The employee acquires a Master's degree. The record with code "14-Post-Bachelor's" could be deleted and a new row could be inserted if employee acquires level "17-Master's degree."

A matrix for determining how to complete education information follows this procedure. A table defining education levels can be found in the section labeled "CHRIS Codes/Terms."

#### Administer Workforce > Administer Workforce (USF) > Use > Education

- 1. Locate appropriate employee.
- 2. Enter Education Level.
- 3. If education level is *06*, *10*, *13 or higher*, complete the following:
  - a) Enter Credit Hours attained (optional).
  - b) Enter **GPA** (optional).
  - c) Enter Credit Hrs Type. (This field must be completed if Credit Hours is completed.)
  - d) Enter the Instructional Program Code. (The magnifying glass can be used to search by Description.) (Descr will automatically populate based on the Instructional Program Code selected.)

- e) Enter the **School Code** (click on the magnifying glass to search by State). If you do not find the school you need, contact the CHRIS Functional Hotline via e-mail with the school name and location (city, state). You will be notified via e-mail when the **School Code** has been added to the database. (Only Schools above high school level technical, business, colleges and universities will be added to the school table.) Education information can be saved without School Name, but remember to enter this information after the School Code is assigned. **School**, **State**, and **Country** will autopopulate based on selection of the **School**
- 4. **Insert** a Row (+) to add additional education levels if necessary.
- 5. Click on the Save icon.

Education Level *	Instructional Program	Year Degree or Certificate Attained	
01 - No formal education or some elementary school	Must be blank	Must be blank	
02 - Elementary school completed no high school	Must be blank	Must be blank	
03 - Some high schooldid not graduate	Must be blank	Must be blank	
04 - High school graduate or certificate of equivalency	Must be blank	Must be blank	
05 - Terminal occupational program-did not complete	Must be blank	Must be blank	
06 - Terminal occupational program-certificate of completion, diploma or equivalent.	Must be completed if employee entered on duty after 9/30/93, and tenure is 1 or 2	Must be completed if employee entered on duty after 9/30/93, and tenure is 1 or 2	
07 - Some collegeless than year one	Must be blank	Must be blank	
08 - One year college	Must be blank	Must be blank	
09 - Two years college	Must be blank	Must be blank	
10 - Associate Degree	Must be completed if employee entered on duty after 9/30/93, and tenure is 1 or 2	Must be completed if employee entered on duty after 9/30/93, and tenure is 1 or 2	
11 - Three year college	Must be blank	Must be blank	
12 - Four years college - no baccalaureate	Must be blank	Must be blank	
13 – Bachelor's degree	Must be completed	Must be completed	
14 - Post-Bachelor's	Must be completed	Must be completed	
15 - First professional	Must be completed	Must be completed	
16 - Post-first professional	Must be completed	Must be completed	
17 – Master's degree	Must be completed	Must be completed	
18 - Post-Master's	Must be completed	Must be completed	
19 - Sixth-year degree	Must be completed	Must be completed	
20 - Post-sixth year	Must be completed	Must be completed	
21 - Doctorate degree	Must be completed	Must be completed	
22 - Post-Doctorate	Must be completed	Must be completed	

<sup>\*</sup> Must be completed for all employees

# **How to Enter/Update Employee Review (Performance Rating) Information**

Employee review information must be entered in CHRIS in the following situations:

- 1. **Hire Actions**: When any type of hire action is entered in CHRIS, a performance rating record must be entered with the **same** effective date as the Hire action. Hire actions include all NOA Code 1XX actions, as well as some 5XX and those 7XX actions which add a new employee to CHRIS, such as internal hires from FERC and BPA. The Review Date automatically defaults to the effective date of the hire; however this date will not display on the initial employee review page. The rating level must be "X" or "Z" for the initial row inserted with a hire action.
- 2. Upon receipt of the performance file from a previous Federal agency or the Federal Records Center: When new employees are appointed to DOE by transfer or reinstatement, official ratings of record issued by the prior Federal agency/agencies must be entered in CHRIS if they were issued within the 4-year period immediately prior to the DOE appointment. Since this information is not available at the time the employee comes on board, performance rating history records must be entered upon receipt from the former agency.
- 3. **Employee Receives Official Rating of Record**: An employee's official rating of record must be entered in CHRIS. PERFORMANCE RATINGS, OTHER THAN OFFICIAL RATING OF RECORD, WILL NOT BE ENTERED IN CHRIS. Rating of record means the performance rating prepared at the end of an appraisal period for performance of agency-assigned duties over the entire period and the assignment of a summary level within a pattern as defined in the attached table. For an employee not subject to 5 U.S.C. Chapter 43 or 5 CFR Part 430, it means the officially designated performance rating, as provided for in the agency's appraisal system, that is considered to be an equivalent rating of record. For additional information refer to 5 CFR 351--Reduction in Force, 5 CFR Part 430--Performance Management, and 5 CFR Part 531--Pay Under the General Schedule. If an employee is not rated during any particular performance cycle, the employee review information should be updated in the system to indicate that the employee was not rated.
- 4. **Employee is Converted to an SES Position From Any Non-SES Pay Plan**: When an employee is converted to an SES position from any non-SES pay plan, a new performance rating row effective on the date of the conversion action must be inserted to indicate that the employee has not yet been rated under the SES performance requirements. This new performance rating row should be entered when the PAR Status on the conversion transaction is changed to "PRO."
- 5. **Employee Moves From a Covered to an Excluded Position**: When an employee moves from a covered to an excluded position (e.g., from ES to EX), a new performance rating row effective on the date of the conversion action should be inserted to indicate that the employee is excluded from coverage. In DOE, employees in Pay Plans GS, GM, ES, WG, WL, WS, WB, AD, SL, ST, EJ, and EK will be covered by a performance management system. Employees in Pay Plans EX\*, ED, EF, EI, AL, CA and ZZ will be excluded from coverage.

\*EX employee with a pay rate determinant of "S" are covered by the SES Performance Management Plan if they elect to retain eligibility for SES performance appraisals and awards. Otherwise, they are excluded from coverage. **Examples**:

An ES employee is converted to EX position:

Create new performance management row Review Date=Conversion Date Rating Pattern=H Rating=Z (Excluded)

An ES employee with a pay rate determinant of "S" is converted to an EX position and declines coverage for ES performance appraisals and awards:

Create new performance management row

Review Date=Conversion Date

Rating Pattern=H

Rating=Z (Excluded)

An ES employee with a pay rate determinant of "S" is converted to an EX position and retains eligibility for ES performance appraisals and awards:

No action is necessary since employee should already be on cycle to receive next official rating of record.

6. **Employee moves from an Excluded to a Covered Position**: When an employee moves from an excluded to a covered position, a new performance rating row effective on the date of the conversion action should be inserted to indicate that the employee is now in a covered position but has not yet been rated and to record the appropriate rating pattern/scale. See paragraph 4 above for a list of covered and excluded pay plans. **Examples**:

An EX employee is converted an ES position

Create new performance management row

Review Date=Conversion Date

Rating Pattern=F

Rating=X (Not rated)

An Expert (ED) or Consultant (EF) is converted to a GS position

Create new performance management row

Review Date=Conversion Date

Rating Pattern=A, B, C, D, E, F, G or H

Rating=X (Not rated)

An Expert (ED) or Consultant (EF) is converted to an ES position

Create a new performance row

Review Date=Conversion Date

Rating Pattern=F

Ratings=X (Not rated)

A matrix for determining how to complete review information follows this procedure. A table defining rating patterns/scales can be found in the section labeled "CHRIS Codes/Terms."

#### Administer Workforce > Manage Performance (USF) > Use > Employee Review

- 1. Select employee.
- 2. A new row must be inserted (+) for each official rating.
- 3. Enter **Review Date**. This is the date the supervisor communicated the rating to the employee and is considered the rating effective date.
- 4. Enter **Rating Pattern**. You must determine the appropriate rating pattern that your sub-agency uses. Some may be different for SES, Supervisory, and/or Non-supervisory employees and should be changed for employees who have recently been reassigned to a difference rating pattern, i.e., GS to FS
- 5. Enter **Rating Level** or select from drop-down list.
- 6. Check **Issued by non-DOE agency** box if applicable.
- 7. Enter **Review From Date**. This is the date that marks the beginning of the rating period.
- 8. Enter **To Date**. This is the date that marks the end of the rating period.
- 9. **Next Review Date**. Leave blank DO NOT POPULATE.
- 10. **Date Validated** is used for review of employee ratings in preparation for reduction-in-force and should not be populated until an actual review is being performed.
- 11. Save.

Category	Review Date	Rating Pattern	Rating Level	Review From Date	Review To Date	Next Review Date	Date Validated
Hire Actions for Pay Plans GS, GM, WG, WL, WS, WB, AD, SL, ST, EX*, EJ, EK, and EN	Date of Hire	A, B, C, D, E, F, G or H	X	Leave Blank	Leave Blank	Leave Blank	Leave Blank
Hire Actions for Pay Plans EX, EX*, ED, EF, EI, AL, CA and ZZ	Date of Hire	Н	Z	Leave Blank	Leave Blank	Leave Blank	Leave Blank
Hire Actions for Pay Plan ES	Date of Hire	F	X	Leave Blank	Leave Blank	Leave Blank	Leave Blank
Conversion to ES from any non-ES pay plan	Date of Conversion	F	X	Leave Blank or Delete	Leave Blank or Delete	Leave Blank	Leave Blank
Hire Actions for Pay Plans EX*, ED, EF, EI, AL, CA and ZZ	Date of Hire	Н	Z	Leave Blank	Leave Blank	Leave Blank	Leave Blank
Conversion from a covered to an excluded position (e.g., ES to EX; ES to EX*)	Date of Conv. Action	Н	Z	Leave Blank	Leave Blank	Leave Blank	Leave Blank
Conversion from an excluded to a covered position (e.g., EF to ES;)	Date of Conv. Action	A, B, C, D, E, F, G or H	X	Leave Blank	Leave Blank	Leave Blank	Leave Blank
Ratings issued by DOE prior to 10/1/97	Eff. Date of Rating**	DOE	1, 2, 3, 4 or 5	Date rating period began	Date rating period ended	Leave Blank	Leave Blank
Ratings issued by DOE after 9/30/97	Eff. Date of Rating**	A, B, C, D, E, F, G or H	1, 2, 3, 4, 5 or X***	Date rating period began	Date rating period ended	Leave Blank	Leave Blank
Ratings issued by Federal agency other than DOE prior to 10/1/97****	Eff. Date of Rating**	OFA	1, 2, 3, 4 or 5	Date rating period began	Date rating period ended	Leave Blank	Leave Blank
Ratings issued by Federal agency other than DOE after 9/30/97****	Eff. Date of Rating**	A, B, C, D, E, F, G or H	1, 2, 3, 4 or 5	Date rating period began	Date rating period ended	Leave Blank	Leave Blank

- \* In DOE, employees in Pay Plans GS, GM, ES, WG, WL, WS, WB, AD, SL, ST, EJ, EK, and EX (pay rate determinant of "S") will be covered by a performance management system. Employees in Pay Plans EX, ED, EF, EI, AL, CA and ZZ will be excluded from coverage. EX employees with a pay rate determinant of "S" are covered by the SES Performance Management Plan if they elect to retain eligibility for SES performance appraisals and awards. Otherwise, they are excluded from coverage.
- \*\* Eff. Date of Rating is the date the rating is communicated to the employee which should also be the date the supervisor signed the official rating of record.
- \*\*\* If an employee is not rated during a particular rating cycle, a review record must be established. The review date would be established as the end date for the rating cycle, the appropriate pattern for the employee must be entered, and an X (not rated) should be entered for the rating.
- For ratings issued by a Federal agency other than DOE, check the box labeled "Issued by non-DOE agency." This check box has been added to the Employee Review page as of 2/7/99.

# **How to Manually Correct/Update "Reports to Position" and "Supervisor ID"**

The following procedure should be used to complete manual updates:

Print the following reports: Department Managers Report, "Reports to" Report, and "Reports to Difference" Report using the instructions in the section of the manual entitled "CHRIS Reporting."

- 1. Determine whether corrections are needed in the Position Data record.
  - -- Remember that the "Reports to Position" number is stored in employee's Position Data record and also in personnel transactions. This information may need to be corrected in the Position Data record, in personnel transactions, or in both records. It is important to first correct the information in the Position Data record.
  - -- In some situations, you will be able to make the correction on the employee's current Position Data row while, in other situations, you will need to insert a new Position Data row to update "Reports to Position" number. For example, if you had a recent supervisory change within an organization, you will need to insert a new Position Data row for **each** employee assigned to that supervisor.
  - -- On the employee's new Position Data row, use an effective date that is equal to or greater than the effective date of the supervisor's assignment to his/her new position.
  - -- If you attempt to enter a "Reports to Position" Position and you receive a system message that the Position is not valid, this usually means one of two things. Either the "Reports to Position" number has been keyed incorrectly, or it was not a valid position as of the effective date of the Position Data record that you are adding or updating.

- 2. Once appropriate corrections/updates have been made to the Position Data record, process an NOA Code 966-Change in Non-SF-50 data to correct/update the "Reports to Position" and the "Supervisor's ID" on Employee Data 2 page if that information is incorrect.
  - -- Simply insert your new transaction, complete the information on the Data Control page, and refresh the Position. (Any time the Position is refreshed you will need to re-enter the employee's step). The "Reports to Position" number, Title, "Supervisor's ID" and Name should now contain current information on the Employment 2 page. If the "Supervisor's ID" and name are missing, this means that a supervisor was not assigned to the "Reports to Position" number you entered on the Position Data record on the effective date of the NOA Code 966 action.

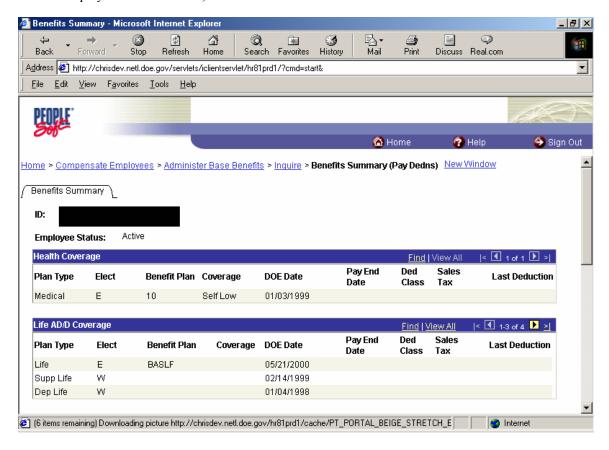
Always use a current date for the NOA Code 966; retroactive changes could require that you process corrections to actions with a more recent effective date.

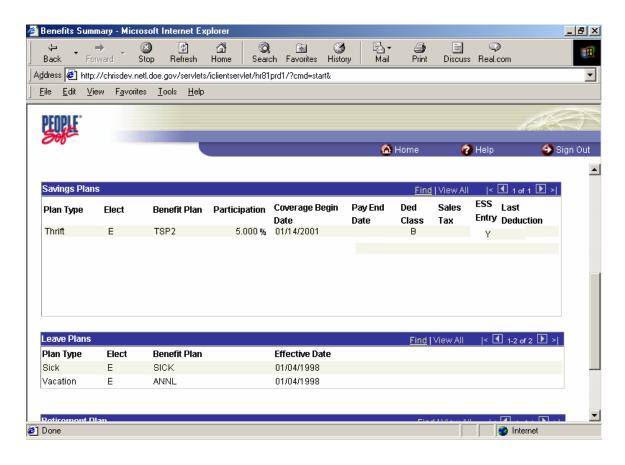
3. Mass processing capabilities exist for updating this information, refer to the section in this manual entitled *Mass Processing*.

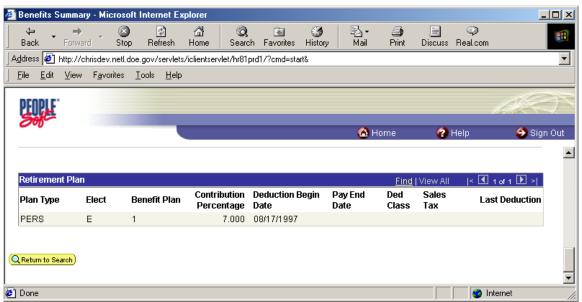
# **Benefits Inquiry Options**

#### Compensate Employees > Administer Base Benefits > Inquire/Benefits Summary (Pay Dedns)

This page will display health benefits information for an employee to which you have access (also known as FEHB-Federal Employee Health Benefits).







On the above page, **Benefits Summary**, you can view the Health Benefits information for an employee.

#### **Health Benefits Section**:

Plan Type -- Health Coverage

Elect -- E-Elect; W-Waive or T-Terminate

Benefit Plan -- Carrier Code

Coverage an employee elected: Self – High

Self – Low

Self+Family-High Self+Family-Low

Self – Std

Waived/Canceled

Ineligible for Health Benefits

**DOE Date** -- which can be several different dates. It can be the date DOE converted to CHRIS as the system of record. It is not necessarily the effective date of the employees benefits election unless the employee is a new hire since conversion January 4, 1998 or if the employee made a change in election since that same conversion date. That is why this field is called the DOE Date and not "Effective Date" because it could be one of those scenarios; or it could be a date when the employee had a "life event" action as in a marriage or birth of a child.

Pay End Date -- Date employee terminated coverage

The rest of the fields are not populated, as we do not use the PeopleSoft Payroll product.

### Life AD/D Coverage:

**Type of Life Insurance**: (See page shots below for valid values)

FEGLI (Life Insurance) Plan: BASLF – Basic Life

BLF1 – Option B Additional (1x base) BLF2 – Option B Additional (2x base) BLF3 – Option B Additional (3x base) BLF4 – Option B Additional (4x base) BLF5 – Option B Additional (5x base) OPCLF – Option C Family (1x base) OPCLF2 – Option C Family (2x base) OPCLF3 – Option C Family (3x base) OPCLF4 – Option C Family (4x base) OPCLF5 – Option C Family (5x base) OPCLF5 – Option C Family (5x base) LBEN – FEGLI Living Benefits

OPLAF – Option A Standard (\$10,000)

**DOE** Date: which meets the same criteria as the one for Health Benefits above as to what this date could be.

### **TSP Information**:

Plan Type -- TSP

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**Elect**: E – Elect, W – Waive, T – Terminate

Benefit Plan: TSP1 – TSP EMPLOYER MATCH-FERS

TSP2 – TSP NO MATCH-CSRS

\$ or % B/A Tax -- Dollar or Percent of contribution

**ESS Entry** -- this checkbox will be checked (or "on") only if the employee entered the information through the ESS system—otherwise it will not be checked.

**Coverage Begin Date**: With the recent open enrollment period, this date should reflect the effective date of the most recent election or change made by the employee.

Pay End Date: Would equal the date the employee terminated their TSP election.

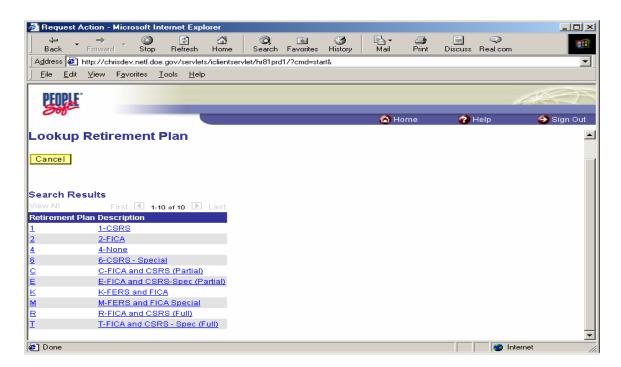
And the last columns on this line would indicate only if it were a Before Tax (B) deduction or and After Tax (A) deduction.

### **Retirement Plan**

Plan Type -- Retire

**Elect**: E – Elect, W – Waive, T – Terminate

#### **Benefit Plan**:



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**Contribution Percentage** -- This is a percent calculation based on the Retirement Plan and Retirement Type entered for the employee based on the type of employee this is for (FERS or CSRS) and the retirement code listed above. (Please check with your benefits administration team if you have questions about this field.)

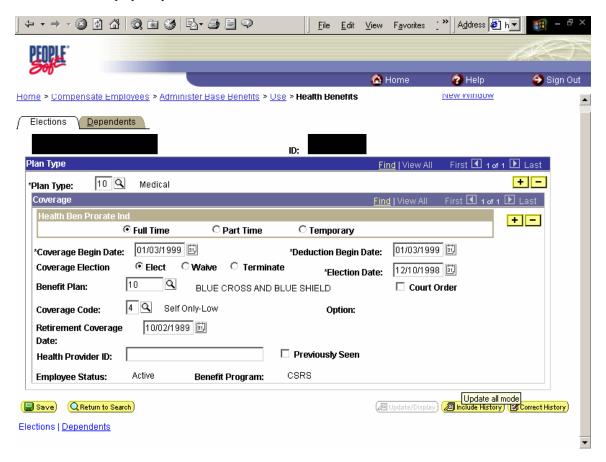
**Deduction Begin Date**: Shows DOE date information.

#### **Health Benefits Page:**

This page has a checkbox to indicate if there is a Court Order for an employee regarding benefits or not.

### Compensate Employees > Administer Base Benefits > Use > Health Benefits

Access will be Display Only.



If the checkbox is "on" or checked, it indicates that the Payroll/Benefits department has received a court order for this employee; if there is no check, then no court order has been received by the Payroll/Benefits department.

# 4 Hire Actions

# **Contents**

- ⇒ CHRIS Action/Reason Code and Nature of Action Crosswalk Hire
- ⇒ Hire (Hire, Transfer, Hire NTE, Term, Temporary, and Appt NTE, etc.)
- **⇒** Rehire

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# **4.1 CHRIS Action/Reason Code and Nature of Action Crosswalk – Hire Actions**

Action Code	Action Description	Action/Reason Code	Nature of Action/Codes
ADL	Concurrent Appointment	CAR - Career Appointment CCA - Career-Conditional Appointment	100 - Career Appt 101 - Career-Cond Appt 107 - Emergency Appt 120 - O/S Ltd Appt 130 - Transfer 132 - Mass Transfer 140 - Reins-Career 141 - Reins-Career 170 - Exc Appt 171 - Exc Appt NTE 198 - Interim Appt in Nonduty Status
ASC	Intl Assignment Completion	ASC – Intl Assignment Completion	199 - Interim Appt 500 - Conv to Career Appt
ASG	Intl Assignment	FEX – Foreign Expatriate Assignment FIN – Foreign Inpatriate Assignment FLA – Foreign Loan Assignment NAT – Third Country National	520 - Conv to O/S Ltd Appt
HIR	Hire	ADM – Administrative Accession BRO - Brought into Competitive Service CMP – Competitive Appointment DEM - Change to Lower Grade ECA - Expert/Consultant Appointment EMG – Emergency Appointment EXC – Excepted Service Appointment EXO - Executive Order Appointment FNA - Foreign National Appointment IPA – Intergovernmental Personnel Act LAT – Lateral MIL – Military NPS - New Position OVS – Overseas Limited Appointment PAN – Provisional Appointment NTE PRO – Promotion RES – Reinstatement Appointment RRR – Restoration/Reemployment Right SCH – Schedule A, B, C, Appointment SES - Senior Executive Service Appt STQ – Appointment Status Quo TMP – Temporary Appointment TRN – Trainee VOL – Volunteer Appointment VRA - VRA Appointment XFR - Transfer from Agency ZCL – Change to Lower Grade – CAO ZCV – Conversion to – Appt – CAO ZPC – Position Change – CAO ZRS – Reassignment – CAO	100 - Career Appt 101 - Career-Cond Appt 107 - Emergency Appt 108 - Term Appt NTE 112 - Term Appt - PER 115 - Appt NTE 120 - O/S Ltd Appt 122 - O/S Ltd Appt 122 - O/S Ltd Appt NTE 124 - Appt - Status Quo 130 - Transfer 132 - Mass Transfer 140 - Reins-Career 141 - Reins-Career 141 - Reins-Career Appt 143 - Reins-SES Cond 145 - Transfer SES Career 146 - SES Noncareer Appt 147 - Transfer SES Noncareer 148 - SES Ltd Term Appt NTE 149 - SES Ltd Emergency Appt NTE 170 - Exc Appt 171 - Exc Appt NTE 190 - Provisional Appt NTE 198 - Interim Appt 199 - Interim Appt 500 - Conv to Career Appt 501 - Conv to Career - Cond Appt 507 - Conv to Emergency Appt 508 - Conv to Temp Appt NTE 512 - Conv to Temp Appt NTE 515 - Conv to Reins-Career

Action Code	Action Description	Action/Reason Code	Nature of Action/Codes
			542 – Conv to SES Career Appt 543 – Conv to Reins-SES Career 546 – Conv to SES Noncareer Appt 548 – Conv to SES Ltd Term Appt 549 – Conv to SES Ltd Emergency 570 – Conv to Exc Appt 571 – Conv to Exc Appt NTE 590 – Conv to Provisional Appt 702 – Promotion 703 – Promotion NTE 713 – Change to Lower Grade 721 – Reassignment 740 – Position Change 741 – Position Change
REH	Rehire	CMP – Competitive Appointment ECA - Expert/Consultant Appointment EMG – Emergency Appointment EXC – Excepted Service Appointment EXO – Executive Level Appointment FNA - Foreign National Appointment IPA – Intergovernmental Personnel Act MIL – Military OVS – Overseas Limited Appointment RES – Reinstatement/Reemployment RRR - Restoration/Reemployment Right SCH - Schedule A, B, C Appointment SES - Senior Executive Service Appt STQ - Appointment Status Quo TMP - Temporary Appointment TRN - Trainee VOL - Volunteer Appointment VRA - VRA Appointment XFR - Transfer from Agency	997 – Administration Accession  100 - Career Appt 101 - Career-Cond Appt 107 – Emergency Appt 108 - Term Appt NTE 112 - Term Appt – PER 115 - Appt NTE 120 - O/S Ltd Appt 122 - O/S Ltd Appt NTE 124 - Appt – Status Quo 130 – Transfer 132 - Mass Transfer 134 - Reins-Career 141 - Reins-Career-Cond 142 - SES Career Appt 143 - Reins-SES Cond 145 – Transfer SES Career 146 - SES Noncareer Appt 147 – Transfer SES Noncareer 148 - SES Ltd Term Appt NTE 149 - SES Ltd Emergency Appt NTE 170 - Exc Appt 171 - Exc Appt NTE 190 – Provisional Appt NTE 198 - Interim Appt in Nonduty Status 199 - Interim Appt 500 – Conv to Career Appt 501 – Conv to Career Appt 507 – Conv to Emergency Appt 508 – Conv to Temp Appt NTE 512 – Conv to Temp Appt NTE 515 – Conv to Reins-Career 541 – Conv to Reins-Career 541 – Conv to Reins-Career 541 – Conv to SES Career Appt 543 – Conv to SES Career Appt 548 – Conv to SES Noncareer Appt 548 – Conv to SES Noncareer Appt 549 – Conv to SES Ltd Term Appt 549 – Conv to SES Ltd Term Appt 549 – Conv to SES Ltd Term Appt 549 – Conv to SES Ltd Emergency

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Action Code	Action Description	Action/Reason Code	Nature of Action/Codes
			571 – Conv to Exc Appt NTE
			590 - Conv to Provisional Appt
			702 – Promotion
			703 – Promotion NTE
			713 – Change to Lower Grade
			721 – Reassignment
			740 – Position Change
			741 – Position Change NTE
			997 – Administrative Accession

# **4.2 Hire** – (Hire, Transfer, Hire NTE, Term, Temporary, and Appt NTE, etc.)

# Step 1 Create or Modify Position.

- A. If you are re-using an old Position, refer to the section on "Modifying Position" under "Position Information."
- B. If the Position does not exist, refer to the section on "Creating a Position" under "Position Information."

# **Step 2 Process Personnel Action.**

# Administer Workforce > Administer Workforce (USF) > Use > Hire

Click on "Add a New Value."

Click on "Add" and the system will automatically assign an EMPLID when the Hire action is saved.

# □Data Control

- 1. Enter the **Actual Effective Date**.
- 2. Enter Not to Exceed Date if applicable. Action defaults to HIR. PAR Status defaults to REO.
- 3. Select Reason Code.
- 4. Enter the **NOA Code**.
- 5. Enter **Authority #1 and/or Authority #2**; if the authority requires inserts, enter them within the space provided to the right of the **Authority Code** field or as part of the actual **Authority Code** text.

#### PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the > or < arrows to view remarks.

### Tracking Data

- 1. **Action Taken date** defaults to system date. The **Action Taken date** appears in Block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
  - a) Check the **Action Dt Ovrd** box.
  - b) Change Action Taken date.
  - c) Uncheck the **Action Dt Ovrd** box.
- 2. The **Emplid** defaults to the PAR approving official for your sub-agency. The **Emplid** appears in Block 50 of the SF-50. To change (if necessary):
  - a) Check the **Override Operator Emplid** box.
  - b) Enter approving official in the **Emplid** field. <u>DO NOT</u> uncheck **Override Operator Emplid** box.

### **Personal Data**

- 1. Enter First Name.
- 2. Enter Middle Initial or name or NMN if no middle initial (Required).
- 3. Enter Last Name.
- 4. Enter **Suffix** if appropriate.
- 5. Enter **Gender** (default is female change appropriately).
- 6. Enter **Ethnic Group**.
- 7. Enter **Date of Birth**, must enter 4 digit year if prior to 1950.
- 8. Enter **Disability Code**.

9. Enter **National ID**. It is especially important to review the **National ID** entered for a new employee before saving the action.

#### Personal Phone Numbers

- 1. Enter **Personal Phone Numbers**.
- 2. Select **Phone Type** and enter phone number.
- 3. If entering more than one phone number, press (+) while cursor is in **Phone Type** to insert a row.

### Veterans Info

**NOTE**: Refer to Guide to Processing Personnel Actions (Chapters 4 and 7) for a detailed explanation.

- 1. Enter applicable information. Veterans Preference (1, 2, 3, 4, 5 or 6) and Veterans Pref RIF (Y/N).
  - ⇒ If **Veterans Preference** code 2, 3, 4, 5, or 6, **Veterans Pref RIF** should equal Yes.
  - $\Rightarrow$  If **Pay Plan** is *ES* or *EX*, **Veterans Pref RIF** must equal No.
  - $\Rightarrow$  If **Type Appt** is 34 or 44, (Sch C), **Veterans Pref RIF** must equal No.
  - $\Rightarrow$  If Nature of Action is IXX, then Veterans Status may not be "N."

#### **Education Details**

Refer to section entitled "How to Enter/Update Education Information" under General Procedures.

# **□**Job

- 1. Enter the **Position**. (**Job Code, Agency, Sub-Agency, Department,** and **Location** will default from Position Data.)
- 2. Enter the **Transferred From Agency**, if necessary.

### Benefits/FEHB Data

- 1. Select the appropriate **Benefit Program**.
- 2. Select **FEHB Eligibility**.

#### FEGLI/Retirement/FICA

- 1. Enter **FEGLI Code**.
- 2. Enter Retirement Plan.
- 3. Enter **FERS** Coverage.
- 4. Enter Previous Retirement Coverage.
- 5. Enter Annuitant Indicator.
- 6. Enter Annuity Commencement Date, if applicable.
- 7. Enter **CSRS Frozen Service** data if applicable.

### **Position Data**

1. Enter **Type Appt**; other data is grayed-out and defaults from position information.

NOTE: See Relationship Edits Between NOA Code, Type Appt, Posn Occupied, and Tenure table that follows this procedure.

# **Compensation**

- 1. Select Pay Rate Determinant.
- 2. Enter **Step**. The **Step Entry Date** and **Grade Entry Date** defaults to reflect the effective date of the action. These dates represent entry dates in CHRIS and they are not editable.
- 3. If employee is on retained grade or pay, enter applicable information.
- 4. Enter **Annuity Offset Amount** if necessary. (This amount should be a **monthly** amount.)

#### Other Pay Information

1. Enter Earnings Code if appropriate. Based on selection of Earnings Code, you may be required to enter the Pay Period Amount. If more than one earnings code is required, insert a row (+) in the Earnings Code field.

#### Accounting Info

1. Enter Appropriation Code in the **Account** field in the first account field, not in the Account Code field inside the box.

# **Employment 1**

- 1. Review **Service Computation Dates** and change if necessary.
- 2. Enter **LEO SCD** if applicable.
- 3. All SCD's except **TSP** will autopopulate with the effective date of the action. See information on "Using the SCD Calculator" under "Basic Operations/Functions."
- 4. Enter the **TSP** date. This date should not be prior to 01/01/84. This field is mandatory for FERS employees. Leave blank for CSRS employees.
- 5. **Conv Begin Date** will default to effective date of action (only on certain Hires). Change if applicable.
- 6. The **Pay Chg Dt** and the **LEI Date** will autopopulate with the effective date of the action. If employee has prior service counting toward their WGI then enter the LEI Date from prior agency.

# Appt Information

- 1. Nature of Action Code and Current Authority #1/Authority #2 will autopopulate when action is saved in a "PRO" PAR Status. If Hire is NOA Code 5xx or 7xx, these fields must be changed to reflect most recent NOA Code 1xx data.
- 2. Enter Appointment Limits: Amount, Hours and Days, if applicable.
- 3. Enter Special Employment Pgm if applicable.

# **Employment 2**

- 1. Enter appropriate **Probation Dates: Probation Date, SES Probation, Supv/Manager Probation**. These dates should be completion dates of probation periods. Enter date completed if probationary period has already been served. Leave blank if not subject to a probationary period.
- 2. Review/Change Last Promo Date. This field defaults to effective date of hire. Change date, if appropriate.
- 3. Enter **Retained Grade Expires** dates if applicable.
- 4. Select **Tenure Group**. <u>NOTE</u>: Make sure the proper relationship exists between **NOA Code**, **Type Appt, Posn Occupied**, and **Tenure**. (Position Data page.)
- 5. **Permanent Data RIF** will autopopulate from Position Data record. Review and make changes if necessary. Leave blank for pay plans EX, ES, EF, ED, CA, AL, or ZZ.

# Security Info

- 1. Review/Change Security Clearance, Status, and Status Dt.
- 2. Indicate if a **Financial Disclosure** is required.

# ☐ Return to Data Control

- 1. Save.
- 2. Print SF-52 and review for accuracy.
- 3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
- 4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

# Administer Workforce > Administer Workforce (USF) > Use > Request Action

- 1. Click on Correct History
- 2. Select Employee
- 3. Make necessary corrections, delete row (-) or change **PAR Status** to **PRO**.
- Save
- 5. Once action saves, the system will automatically open the Education page if it is was not previously entered.
- 6. Enter **Education** information as described in the section entitled "*How to Enter/Update Education Information*" under "*Basic Operation/Functions*." The education information must be entered or the action will not save as a PAR status of "PRO."
- 7. Once the education information saves, the system will automatically open the Performance Review page. The Rating Pattern and Rating Level must be entered before the hire action will save as "PRO." The Rating Level must equal "X" or "Z" for the initial row inserted with a Hire action. The Review Date does not appear on this page but this date will automatically default to the effective date of the hire when the initial performance record is saved. If you need to add performance rating history prior to hire use the following path: Administer Workforce > Manage Performance > Use > Employee Review. This same path is used to enter annual performance ratings.
- 8. More detailed information on Performance Review is described in the section entitled "How to Enter/Update Employee Review (Performance Rating) Information" under "Basic Operations/Functions."

# Relationship Edits Between NOA Code, Type Appt, Posn Occupied, and Tenure

Edits are in place to ensure that the appropriate relationship is established between NOA Code, Type Appt, Posn Occupied, and Tenure for NOA Code 1XX and 5XX actions. The matrix table below shows the allowable combinations.

	Position Page	Position Page	Employment 2 Page
If NOA Code is:	Then Type Appt must be:	And Posn Occupied must be:	And Tenure must be:
124, 524	20	1	3
112	20	1	3
101, 141, 501, 541	15	1	2
100, 500, 130, 140, 540	10 or 15	1	1 or 2
115, 122, 515, 522	20	1	0
108 or 508	20	1	3
142, 143, 145, 542, 543	50	3 or 4	0
146, 147, 546	55	3 or 4	0
148, 548	60	3 or 4	0
149, 549	65	3 or 4	0
170, 570	30, 32, 36, 38, 40, 42, 44, 46, or 48	0, 2, or 3	0, 1, 2, or 3
171, 571	40, 42, 44, 46, or 48	2	0 or 3
107, 507	20	1	3
120, 520	20	1	3
190, 590	20, 40, 42, 46, or 48	1 or 2	0 or 3

If one or more of these fields are incompatible, an error message will appear indicating that the discrepancy(s) must be resolved before the action will save.

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# 4.3 Rehire

<u>NOTE</u>: Only use this process if the employee's record previously existed in the CHRIS database.

# **Step 1 Create or Modify Position.**

- A. If you are re-using an old Position, refer to the section on "Modifying Position" under "Position Information."
- B. If the Position does not exist, refer to the section on "Creating a Position" under "Position Information."

# **Step 2 Process Personnel Action.**

Administer Workforce > Administer Workforce (USF) > Use > Request Action

# **□**Data Control

- 1. Select Employee.
- 2. **Insert** a row (+).
- 3. Enter the Actual Effective Date. PAR Status defaults to REQ.
- 4. Enter Not to Exceed Date if applicable.
- 5. Select **Action Rehire**.
- 6. Select Reason Code.
- 7. Enter the **NOA Code**.
- 8. Enter **Authority #1 and/or Authority #2**: if the authority requires inserts, enter them within the space provided to the right of the **Authority Code** field or as part of the actual **Authority Code** text.

#### PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the > or < to view remarks.

#### Tracking Data

- 1. **Action Taken date** defaults to system date. The **Action Taken date** appears in Block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
  - a) Check the Action Dt Ovrd box.
  - b) Change Action Taken date.
  - c) Uncheck the **Action Dt Ovrd** box.
- 2. The **Emplid** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in Block 50 of the SF-50. To change (if necessary):
  - a) Check the **Override Operator Emplid** box.
  - b) Enter approving official in the **Emplid of Tracking Row** field. <u>DO NOT</u> uncheck **Override Operator Emplid** box.

# **□**Personal Data

1. Review all **Personal Data** fields and make changes if necessary.

### Personal Phone Numbers

- ⇒ Review/Change **Personal Phone Numbers**.
  - 1. If a change is necessary, enter **Personal Phone Numbers**.
  - 2. Select **Phone Type** and enter phone number.
  - 3. If entering more than one phone number, press (+) while cursor is in **Phone Type** to insert a row.

### **Veterans Info**

<u>Note</u>: Refer to Guide to Processing Personnel Actions (Chapters 4 and 7) for a detailed explanation.

- 1. Review/Change applicable information. **Veterans Preference** (1, 2, 3, 4, 5 or 6) and **Veterans Pref** RIF (Y/N).
  - ⇒ If **Veterans Preference** is changed to code 2, 3, 4, 5, or 6, **Veterans Pref RIF** should equal Yes.
  - $\Rightarrow$  If **Pay Plan** is *ES* or *EX*, **Veterans Pref RIF** must equal No.
  - ⇒ If **Type Appt** is 34 or 44, (Sch C), **Veterans Pref RIF** must equal No.
  - $\Rightarrow$  If Nature of Action is 1XX, then Veterans Status may not be "N."

# **Education Details**

Review Education data, if necessary upon completion of this action make changes or additions as detailed in section entitled "How to Enter/Update Education Information."

### 

- 1. Delete the **Position**.
- 2. Tab this will remove prior position information.
- 3. Enter the **Position**. (**Job Code**, **Agency**, **Sub-Agency**, **Department**, and **Location** will default from Position Data)
- 4. Tab this will refresh with new position information.
- 5. Enter the **Transferred From Agency**, if necessary.

### Benefits/FEHB/Data

- 1. Review /Change the **Benefit Program**.
- 2. Review/Change **FEHB Eligibility**.

#### FEGLI/Retirement/FICA

- 1. Review/Change FEGLI Code.
- 2. Review/Change Retirement Plan.
- 3. Review/Change FERS Coverage.
- 4. Review/Change Previous Retirement Coverage.
- 5. Review/Change Annuitant Indicator.
- 6. Enter Annuity Commencement Date, if applicable.
- 7. Enter **CSRS Frozen Service** data if applicable.

# **Position Data**

1. Review/Change **Type Appt**; other data is grayed-out and defaults from position information.

NOTE: See Relationship Edits Between NOA Code, Type Appt, Posn Occupied, and Tenure table that preceeds this procedure.

# **Compensation**

- 1. Enter **Step**. The **Step Entry Date** and **Grade Entry Date** defaults to reflect the effective date of the action. These dates represent entry dates in CHRIS and they are not editable.
- 2. If employee is on retained grade or pay, enter applicable information.
- 3. Enter Annuity Offset Amount if necessary. (This amount should be a monthly amount.)

### Other Pay Information

- 1. Review/Change Pay Rate Determinant.
- 2. Review/Change/Enter **Earnings Code** if appropriate. Based on selection of **Earnings Code**, you may be required to enter the **Pay Period Amount**. If more than one earnings code is required, insert a row (+) in the **Earnings Code** field. To delete an Earnings Code carried forward from prior row press (-) or Alt-8, enter.

#### **Accounting Info**

1. Review/Change Appropriation Code in the Account field in the first Account field, not the Account Code inside the box.

# **Employment 1**

- 1. Review **Service Computation Dates** and change if necessary. See information on "*Using the SCD Calculator*" under "*Basic Operations/Functions*."
- 2. Enter **LEO SCD** if applicable.
- 3. Enter the **TSP** if blank. This date should not be prior to 01/01/84. This field is mandatory for FERS employees. Leave blank for CSRS employees.
- 4. **Conv Begin Date** will default to effective date of action, if applicable.
- 5. The **Pay Chg Dt** and the **LEI Date** will autopopulate with the effective date of the action, if applicable. If employee has prior service counting toward their WGI then enter the LEI date from prior agency.

#### Appt Information

- 1. **Nature of Action Code** and **Curr Authority #1/Authority #2** will autopopulate when action is saved in a "PRO" **PAR Status**. If rehire is NOA Code 5xx or 7xx, these fields must be changed to reflect most recent NOA Code 1xx data.
- 2. Enter Appointment Limits: Amount, Hours and Days, if applicable.
- 3. Enter **Special Employment Pgm** if applicable.

# **Employment 2**

- 1. Enter appropriate **Probation Dates: Probation Date, SES Probation, Supv/Manager Probation**. These dates should be completion dates of probation periods. Enter date completed if probationary period has already been served. Leave blank if not subject to a probationary period.
- 2. Review/Change Last Promo Date. This field defaults to effective date of hire. Change date, if appropriate.
- 3. Enter **Retained Grade Expires** dates if applicable.
- 4. Review/Change **Permanent Data RIF**, autopopulates from position data record. Leave blank for pay plans EX, ES, EF, ED and EI. If revising old position review, and change these fields on the Position Data Record.
- 5. Review/Change **Tenure Group**. **NOTE:** Make sure the proper relationship exists between **NOA Code, Type Appt, Posn Occupied,** and **Tenure** (Position Data page).

# Security Info

- 1. Review/Change Security Clearance, Status, and Status Dt.
- 2. Indicate if a **Financial Disclosure** is required.

# ☐ Return to Data Control

- 1. Save.
- 2. Print SF-52 and review for accuracy.
- 3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save
- 4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

# Administer Workforce > Administer Workforce (USF) > Use > Request Action

- 1. Click on Correct History
- 2. Select Employee
- 3. Make necessary corrections, delete row (-) or change PAR Status to PRO.
- 4 Save
- 5. Once action saves, the system will automatically open the Education page if it was not previously entered.
- 6. Enter **Education** information as described in the section entitled "How to Enter/Update Education Information" under "Basic Operation/Functions." The education information must be entered or the action will not save as a **PAR Status** of "**PRO**."

# Administer Workforce > Manage Performance > Use > Employee Review

- 1. Click on Correct History.
- 2. Review/Update the Employee Review Information. In most cases you will need to enter a new Employee Review row using the effective date of the Rehire to reflect the employees rating pattern and rating level of "X" or "Z." In some cases you may not need to enter a new row:

**Example**: Employees most recent Employee Review row is within the last year.

More detailed information on Performance Review is described in the section entitled "How to Enter/ Update Employee Review (Performance Rating) Information" under "Basic Operations/Functions."

# **5** Change Actions

#### **Contents**

- **⇔** CHRIS Action/Reason Code and Nature of Action Crosswalk
- **⇒** Reassignment Across Sub-Agencies
- **⇒** Subagency Transfer Form
- **⇒** Reassignment Between DOE PeopleSoft Systems
- **⇒** Reassignment
- **⇒** Realignment
- **⇔** Change In Title
- **⇒** Change In Retirement Plan
- **⇒** Change in Tenure
- **⇔** Change In Veterans Preference for RIF
- **⇒** Change Fund Type/B&R Code
- **⇔** Change In Hours
- **⇒** Change In Work Schedule
- **⇒** Change In Duty Station
- **⇒** Name Change
- **⇒** Change In Service Computation Date
- **⇒** FEGLI Change
- **⇒** Suspension NTE Or Suspension Indefinite
- **⇒** Leave Without Pay
- **⇒** Extension Of LWOP
- **⇒** Return To Duty
- **⇒** Conversion/Conversion NTE
- **⇒** Position Change
- ⇒ Non SF-50 Change/Correction NOA Code 966
- **⇒** SF-113 Ceiling Flag
- **⇒** Denial Of WGI
- **⇒** Termination Of Grade Retention

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# 5.1 CHRIS Action/Reason Code and Nature of Action Crosswalk – Change Actions

Action Code	Action Description	Action/Reason Code	Nature of Action/Codes
DTA	Data Change	B&R - Change Fund Type/B&R Code	750 - Continuance NTE
		CAC - Change - Agency Code	755 - Exception to RIF Release
		CAI - Change - Annuitant Indicator	780 - Name Change From
		CBU - Change – Bargaining Unit	781 - Change in Work Schedule
		CCP - Change/Correct Position Number	782 - Change in Hours
		CDE - Change in Data Element	792 - Change in Duty Station
		CDP - Correction Department	800 - Change in Data Element
		CFC - Change - FLSA Category	803 - Change in Retirement Plan
		CJC - Correction - Job Code	805 - Elected Full Living Benefits
		COC - Change - Occup Code	806 - Elected Partial Living Benefits
		CON - Change in Organization Name	880 - Change in Tenure Group
		CPI - Change - Personnel Office ID	881 - FEGLI Change
		CPO - Change - Position Occupied	882 - Change in SCD
		CPR - Change - Pay Rate Determinate	883 - Change in Vet Preference for RIF
		CSA - Change in Sub-Agency	888 - Denial of WGI
		CSO – Change in Sub-Agency & Org Name	904 – Change Fund Type/B&R Code
		CSV – Change in Supervisor	927 – Change in Sub-Agency
		CTL – Change in Title	928 - Change in Sub-Agency & Org Name
		DTY – Change in Duty Station	929 - Change in Organization Name
		DWI – Denial of Within Grade Increase	933 - Change in Title
		EMP - At Employees Request	940 - Standby Premium Pay
		EXC – Exception to RIF Release	941 - Non-Foreign COLA
		FEG – FEGLI Change	942 – Post Allowance
		FLB – Elected Full Living Benefits	943 – Foreign Post Differential
		FTI – From FT to Intermittent	944 – Home Leave Authorization
		FUL – From Part-Time to Full-Time	945 – Physician's Comparability
		HRS – Change in Hours	966 - Change/Correct Non-SF-50 Element
		IFT – From Intermittent to FT	,
		IPT – From Intermittent to PT	
		NMC – Name Change	
		NSF – Change/Correct Non-SF-50 Element	
		NTE – Continuance NTE	
		OTH – Other	
		PAR – From Full-Time to Part-Time	
		PLB – Elected Partial Living Benefit	
		PTI – From PT to Intermittent	
		RET - Change in Retirement Plan	
		SCD - Change in SCD	
		STC - Status Change	
		TEN - Change in Tenure Group	
		VET - Change in Veterans Preference	
EXT	Extension of NTE Date	CON – Conversion to Appt NTE	515 - Conversion to Appt NTE
EAI	EAGISION OF INTE Date		571 - Conversion to Appt NTE 571 - Conv to Excepted Appt NTE
		EAN - Extension of Appt NTE	1 11
		EEA - Conversion to Exc Appt NTE	760 - Extension of Appt NTE
		EFN - Extension of Furlough NTE	762 - Extension of SES Limited Appt NTE
		ELP - Extension of LWOP NTE	765 – Ext of Term Appt NTE

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Action Code	Action Description	Action/Reason Code	Nature of Action/Codes
		EPC - Extension of Position Change NTE EPN - Extension of Promotion NTE ESE - Extension of SES Limited Appt NTE ETA - Ext of Term Appt NTE EXT - Extension of NTE Date SLG - Assignment to State/Local Gov.	769 - Extension of Prom NTE 770 - Extension of Position Change NTE 772 - Extension of Furlough NTE 773 - Extension of LWOP NTE
PLA	Paid Leave of Absence	PDR – Pending Disability Retirement PTD – Partial/Total Disability SEA – Seasonal	480 – Sabbatical NTE
POS	Position Change	CAO - Position Change – CAO COC – Change in Occupational Code CON – Change in Org Name CSA – Change in Sub-Agency CSO – Change Sub-Agency & Org Name CSV – Change in supervisor EMP – Employee Request FPP - Failed Probationary Period ILR - In Lieu of RIF INA - Position Inactivated JRC - Job Re-Classification NCS - Issuance of New Class Standard NEW - New Position OTH – Other PRO – Promotion REA – Realignment RED – Reorganization REL – Realignment – CAO RIF - Resulting from RIF RSG – Reassignment STA - Position Status Change TTL – Title Change UPD – Position Data Update	500 - Conversion to Career Appt 721 - Reassignment 740- Position Change 790 - Realignment 933 - Change in Title
REC	Return from Suspension/Furlough	XFR – Transfer RTD - Return to Duty	292 - Return to Duty
RFL	Return from LWOP	RFL - Return from LWOP	280 - Placement in Pay Status 292 - Return to Duty 293 - Return to Pay Status
STO	Short Term Disability	STD - Short Term Disability	460 - LWOP NTE
SUS	Suspension	DAC – Disciplinary Action DSB - Disorderly Behavior ILA - Illegal Action IND - Suspension – Indefinite NTE - Suspension NTE	450 - Suspension NTE 452 - Suspension - Indefinite
XFR	Reassignment/Conversion	CAO - Conv to Appointment - CAO CRM - Competitive Reassignment CTA - Conv to Appointment EER - Employee Request EXC - Exception to Competition FPP - Failed Managerial/Supervisory Period ILR - In Lieu of RIF MRR - Manager Request	500 - Conv to Career Appt 501 - Conv to Career-Cond Appt 507 - Conv to Emergency Appt 508 - Conv to Term Appt NTE 512 - Conv to Term Appt – PER 515 - Conv to Appt NTE 520 - Conv to O/S Ltd Appt 522 - Conv to O/S Ltd Appt

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Action Code	Action Description	Action/Reason Code	Nature of Action/Codes
		MSP - MSPB Decision	524 - Conv to Appt-Status Quo
		NCS - Issuance of New Classification Standards	540 - Conv to Reins-Career
		OMB - Resulting from OMB Circular A-76	541 - Conv to Reins-Career-Cond
		PRO – Promotion	542 - Conv to SES Career Appt
		PSC - Position Change – CAO	543 - Conv to Reins-SES Career
		PSN - Position Change	546 - Conv to SES Noncareer Appt
		RCA – Reassignment – CAO	548 - Conv to SES Ltd Term Appt
		RCL - Resulting from Reclassification	549 - Conv to SES Ltd Emergency
		REA – Realignment	570 - Conv to Exc Appt
		RIF – RIF	571 - Conv to Exc Appt NTE
		RLC – Realignment – CAO	590 - Conv to Provisional Appt NTE
		ROR - Reorganization	721 – Reassignment
		ROT – Reassignment (Other)	740 - Position Change
		RPL - Resulting from RPL, CTAP, ICTAP	741 - Position Change NTE
		SES - Senior Executive Service Appt	790 – Realignment
		VRA - VRA Appointment	

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# 5.2 Reassignment Across Sub-Agencies

Movement of an employee across Sub-Agencies is defined as any personnel action taken to move an employee from the field to Headquarters, from Headquarters to the field, or from one field office to another field office. Movement of an employee between program offices at Headquarters is not covered by this procedure since users at Headquarters have access to employees for all Sub-Agencies serviced at Headquarters. Movement across Sub-Agencies can involve any number of personnel action types from a simple reassignment to the promotion of a grade 15 to an SES position. The key to whether this procedure must be utilized is whether the employee will be serviced by a different Servicing Personnel Office.

The following steps must be completed when an employee is selected for a position in a different DOE sub-agency:

#### The gaining sub-agency will:

- Contact the losing sub-agency to establish the effective date of the transfer.
- Establish a new position or activate an existing position in CHRIS ensuring that the effective date of the position is on or before the effective date of the employee's transfer to the new sub-agency.
- Complete the Request for Initiation of Sub-agency Transfer and fax to the HR POC of the losing sub-agency
  for concurrence. This concurrence can be obtained through e-mail messages as long as all required data fields
  listed on the form are included in the e-mail and the e-mail request is sent to <a href="CHRISFunctional@netl.doe.gov">CHRISFunctional@netl.doe.gov</a>
  through the losing HR POC. There must be clear evidence in the e-mail received by the CHRIS Functional
  staff that the losing sub-agency concurs in the transfer.
- Verify all data entered by the CHRIS Functional staff, make changes as appropriate and finalize the action for the transfer by changing the PAR Status to "PRO."
- Print and distribute SF-50's and request the Official Personnel Folder from the losing HR Office.

#### The losing sub-agency will:

- Coordinate the effective date of the transfer with the losing supervisor and provide this date to the gaining subagency.
- Process all actions for the employee that will be effective prior to the date of transfer to the new sub-agency.
- Concur in the employee's release to the new sub-agency and forward this concurrence to the CHRIS Functional staff by signing the Request for Initiation of Sub-agency Transfer or through e-mail to CHRISFunctional@netl.doe.gov.

#### The CHRIS Functional staff will:

- Verify that all required information has been provided by the gaining sub-agency and that proper concurrence for the transfer has been obtained from the losing sub-agency.
- Enter the transfer action in CHRIS in PAR Status "REQ" following receipt of the Request for Initiation of Sub-Agency Transfer or e-mail.
- Advise the gaining sub-agency that the transfer action has been initiated in CHRIS and that it is ready to be finalized by their staff.

# REQUEST FOR INITIATION OF SUB-AGENCY TRANSFER (To be completed by gaining Sub-agency)

#### **To CHRIS Functional Hotline:**

Fax (304) 285-0902

The employee shown below has been selected for a position in the new DOE sub-agency referenced below. Please initiate the sub-agency transfer action in CHRIS and advise the gaining HR Office when the action has been entered in "REQ" PAR Status.

Data Field	Enter Employee & Position Information Referenced in First Column
Employee's Name	
Employee's NID (SSN)	
EMPLID (If available)	
Gaining Sub-agency	
Losing Sub-agency	
Effective Date	
NTE Date (If any)	
Action Code* (e.g., DEM, POS, or XFR, etc.)	
Reason Code* (e.g., CMP, PRO, or REA, etc.)	
NOA Code* (e.g., 713, 721, 702, etc.)	
Authority 1	
Authority 2 (If required)	
New Position Number	
New Official Position Title	
New Pay Plan	
New Occupational Series	
New Grade	
New Step	
New Base Pay (If Pay Plan is EJ, EK, EN, SL, or ST)	
New Competitive Area**	
New Account Code (Appropriations Code)	

Action concurred by:

HRPOC/Personnel Specialist (Gaining Sub-agency): (After signing, fax to losing Sub-agency)				
Signature	Date			
HRPOC/Personnel Specialist (Losing S	<b>Sub-agency):</b> (After signing, fax to CHRIS Functional Hotline, (304) 285	5-0902)		
Signature				

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<sup>\*</sup> See Chapter 14 of the CHRIS Users' Manual for lists of Action, Reason, and NOA Codes.

<sup>\*\*</sup> See Chapter 14 of the CHRIS Users' Manual for a list of Competitive Areas. Use the Competitive Area Request Form in Chapter 3 of the CHRIS Users' Manual to request a new Competitive Area.

# 5.3 Reassignment Between DOE PeopleSoft Systems

<u>NOTE</u>: If employee is transferring to BPA or FERC an Administrative Separation must be processed to terminate status in CHRIS.

The following Actions, Reason Codes, Nature of Actions, and NOA Codes will be used to process hires and separations of DOE employees moving between different DOE PeopleSoft systems (e.g., BPA HRMIS to DOE CHRIS, DOE CHRIS to BPA HRMIS, or, FERC MAPS to DOE CHRIS or DOE CHRIS to FERC MAPS):

Action	Action Description	Action/Reason Code	Nature of Action/Codes
HIR	Hire	ZCV – Conversion to Appt-CAO	500 - Conv to Career Appt
			501 - Conv to Career-Cond Appt
			507 - Conv to Emergency Appt
			508 - Conv to Term Appt NTE
			512 - Conv to Term Appt - PER
			515 - Conv to Appt NTE
			540 - Conv to Reins - Career
			541 - Conv to Reins - Career-Cond
			542 - Conv to SES Career Appt
			543 - Conv to Reins - SES Career
			546 - Conv to SES Noncareer Appt
			548 - Conv to SES Ltd Term Appt NTE
			549 - Conv to SES Ltd Emergency Appt
			NTE
			570 - Conv to Exc Appt
			571 - Conv to Exc Appt NTE
			590 - Conv to Provisional Appt NTE
		ZPR – Promotion-CAO	702 - Promotion
			703 - Promotion NTE
		ZCL – Change to Lower Grade-CAO	713 - Change to Lower Grade
		ZRS – Reassignment-CAO	721 - Reassignment
		ZPS – Position Change-CAO	740 - Position Change
			741 - Position Change NTE
TER	Termination	ZCV – Conversion to Appt-CAO	500 - Conv to Career Appt
			501 - Conv to Career-Cond Appt
			507 - Conv to Emergency Appt
			508 - Conv to Term Appt NTE
			512 - Conv to Term Appt - PER
			515 - Conv to Appt NTE
			540 - Conv to Reins - Career
			541 - Conv to Reins - Career-Cond
			542 - Conv to SES Career Appt
			543 - Conv to Reins - SES Career
			546 - Conv to SES Noncareer Appt
			548 - Conv to SES Ltd Term Appt NTE
			549 - Conv to SES Ltd Emergency Appt
			NTE
			570 - Conv to Exc Appt
			571 - Conv to Exc Appt NTE

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Action	Action Description	Action/Reason Code	Nature of Action/Codes
	Description		590 - Conv to Provisional Appt NTE
		ZPR – Promotion-CAO	702 - Promotion
		ZFK - FIOIIIOUOII-CAO	
			703 - Promotion NTE
		ZCL – Change to Lower Grade-CAO	713 - Change to Lower Grade
		ZRS – Reassignment-CAO	721 - Reassignment
		ZPS – Position Change-CAO	740 - Position Change
			741 - Position Change NTE

# <u>DO NOT USE THE ABOVE REASON CODES TO PROCESS ACTIONS FOR EMPLOYEES MOVING</u> BETWEEN SUB-AGENCIES WITHIN DOE AS THESE EMPLOYEES ARE ALREADY IN CHRIS.

Follow the Hire or Separation processing procedure in your CHRIS Users' Manual. A generic agency of "XX" has been set up in the Agency Table for "Bonneville Power Administration." Enter "XX" as the "Transferred From Agency" or the "Transferred To Agency" on the Job Page to print "Bonneville Power Administration" on the "From" or "To" side of the SF-50. Use "H5" for "Federal Energy Regulatory Commission."

A pop-up screen will display once XX or H5 is entered in the "Transfer From Agency" field on the Job page. The user must enter relevant information on the pop-up screen. This will print in Blocks 7-14 on the SF-50.

# 5.4 Reassignment

# **Step 1 Create or Modify Position.**

- A. If you are re-using an old Position, refer to the section on "Modifying Position" under "Position Information."
- B. If the Position does not exist, refer to the section on "Creating a Position" under "Position Information."

# **Step 2 Process Personnel Action.**

# Administer Workforce > Administer Workforce (USF) > Use > Request Action

# **□**Data Control

- 1. Select Employee.
- 2. **Insert** a row (+).
- 3. Enter the **Actual Effective Date**. **PAR Status** defaults to *REQ*.
- 4. Select Action.
- 5. Select Reason Code.
- 6. Enter the **NOA Code**.
- 7. Enter Authority#1 and/or Authority #2; if the authority requires inserts, enter them within the space provided to the right of the Authority Code field or as part of the actual Authority Code text.

### PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the < and > arrows to view remarks.

### Tracking Data

- 1. **Action Taken date** defaults to system date. The **Action Taken date** appears in Block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
  - a) Check the **Action Dt Ovrd** box.
  - b) Change Action Taken date.
  - c) Uncheck the **Action Dt Ovrd** box.
- 2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in Block 50 of the SF-50. To change (if necessary):
  - a) Check the **Override Operator Emplid** box.
  - b) Enter the required approving official in the **Emplid of Tracking Row** field. <u>DO NOT</u> uncheck **Override Operator Emplid** box.

# **□**Job

- 1. Delete the **Position**.
- 2. Tab this will remove prior position information.
- 3. Enter the **Position**. (**Job Code**, **Agency**, **Sub-Agency**, **Department**, and **Location** will default from Position Data.)
- 4. Tab this will refresh with new position information.

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# **Compensation**

- 1. Review/Change Pay Rate Determinant.
- 2. Enter Step.
- 3. If employee is on retained grade or pay, enter applicable information.

# Other Pay Information

1. Review/Change/Enter **Earnings Code** if appropriate. Based on selection of **Earnings Code**, you may be required to enter the **Pay Period Amount**. If more than one earnings code is required, insert a row (+) in the **Earnings Code** field.

### Accounting Info

 Review/Change Appropriation Code in the Account field in the first account field not in the Account Code inside the box.

# **Employment 1**

- 1. Enter **LEO SCD** if applicable.
- 2. The **Pay Chg Dt** will autopopulate with the effective date of the action, if there is an increase/decrease in Base Pay or unless the Base Pay and Locality/LEO Adjustment does not equal the corresponding fields on the prior <u>non-canceled</u> row within the record.

# **Employment 2**

- 1. Enter appropriate **Probation Dates: Probation Date, SES Probation, Supv/Manager Probation.**These dates should be completion dates of probation periods. Enter date completed if probationary period has already been served. Leave blank if not subject to a probationary period.
- 2. Review/Change/Enter Retained Grade Expires dates as appropriate.
- 3. Review/Change **Permanent Data RIF**. Autopopulates from the Position Data Record. If revising old position, review and change these fields on the Position Data Record.

#### Security Info

- 1. Review/Change Security Clearance, Status, and Status Dt.
- 2. Indicate if a **Financial Disclosure** is required.

#### Return to Data Control

- 1. Save.
- 2. Print SF-52 and review for accuracy.
- 3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
- 4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

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# Administer Workforce > Administer Workforce (USF) > Use > Request Action

- Click on Correct History
   Select Employee.
   Make necessary corrections, delete row (-) or change PAR Status to PRO.
- 4. Save.

**NOTE:** Once old position becomes vacant, follow procedure under "Position Information" tab to inactivate it.

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# 5.5 Realignment

# **Step 1 Modify Position.**

A. If you are re-using an old Position, refer to the section on "Modifying Position" under "Position Information."

# **Step 2 Process Personnel Action.**

Administer Workforce > Administer Workforce (USF) > Use > Request Action

# □Data Control

- 1. Select Employee.
- 2. **Insert** a row (+).
- 3. Enter the **Actual Effective Date**. **PAR Status** defaults to *REQ*.
- 4. Select **Action**.
- 5. Select Reason Code.
- 6. Enter the **NOA Code**.
- 7. Enter Authority#1 and/or Authority #2; if the authority requires inserts, enter them within the space provided to the right of the Authority Code field or as part of the actual Authority Code text.

### PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the < or > arrows to view remarks.

### Tracking Data

- 1. **Action Taken date** defaults to system date. The **Action Taken date** appears in Block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
  - a) Check the **Action Dt Ovrd** box.
  - b) Change Action Taken date.
  - c) Uncheck the **Action Dt Ovrd** box.
- 2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in Block 50 of the SF-50. To change (if necessary):
  - a) Check the **Override Operator Emplid** box.
  - b) Enter the required approving official in the **Emplid of Tracking Row** field. <u>DO NOT</u> uncheck **Override Operator Emplid** box.

# □Job

- 1. Delete the **Position**.
- 2. Tab this will remove prior position information.
- 3. Enter the **Position**. (**Job Code**, **Agency**, **Sub-Agency**, **Department**, and **Location** will default from Position Data.)
- 4. Tab this will refresh with new position information.
- 5. Verify the new **Department** and **Location**.

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# **Compensation**

- 1. Review/Change Pay Rate Determinant.
- 2. Enter Step.
- 3. If employee is on retained grade or pay, enter applicable information.

#### Other Pay Information

1. Review/Change/Enter **Earnings Code** if appropriate. Based on selection of **Earnings Code**, you may be required to enter the **Pay Period Amount**. If more than one earnings code is required, insert a row (+) in the **Earnings Code** field.

### **Accounting Info**

1. Review/Change Appropriation Code in the **Account** field in the first account field, not in the Account Code field inside the box.

# **Employment 1**

1. The **Pay Chg Dt** will autopopulate with the effective date of the action, if there is an increase/decrease in Base Pay or unless the Base Pay and Locality/LEO Adjustment does not equal the corresponding fields on the prior <u>non-canceled</u> row within the record.

# **Employment 2**

1. Review/Change **Permanent Data RIF**, if applicable. Leave blank for pay plans for EX, ES, EF, ED and EI.

# ☐ Return to Data Control

- 1. Save.
- 2. Print SF-52 and review for accuracy.
- 3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
- 4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

# Administer Workforce > Administer Workforce (USF) > Use > Request Action

- 1. Click on Correct History.
- 2. Select Employee.
- 3. Make necessary corrections, delete row (-) or change **PAR Status** to **PRO**.
- 4. Save.

**NOTE:** Once old position becomes vacant, follow procedure under "Position Information" tab to inactivate it.

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# 5.6 Change in Title

# **Step 1 Modify Position**

Develop Workforce > Manage Positions (USF) > Use > Position Data

# **Description**

- 1. Select Position.
- 2. **Insert** a Row (+).
- 3. **Effective Date** and **Status Date** should be on or before the effective date of the action.
- 4. Select Reason.

# □Job Information

Review/Change the Job Code (Click on the magnifying glass to search for variables - You <u>must</u> search by Sub-Agency. Pay Plan, Sal Plan, and Grade will default from the Job Code. When processing retained grade actions, the Job code should reflect the position to which the employee is being assigned - <u>not</u> the position they came from in the retained grade. It will then be necessary to review all of the job code fields before saving the position record to determine if the job code fits the position being created.

#### US Federal Flag

- 1. Review/Change the **Organizational Position Title** (Click on the magnifying glass to search).
- 2. Save.

# **Step 2 Process Personnel Action**

Administer Workforce > Administer Workforce (USF) > Use > Request Action

# □Data Control

- 1. Select Employee.
- 2. **Insert** a row (+).
- 3. Enter the **Actual Effective Date**. **PAR Status** defaults to *REQ*.
- 4. Select Action.
- 5. Select Reason Code.
- 6. Enter the **NOA Code**.

### PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the < or > arrows to view remarks.

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# Tracking Data

- 1. **Action Taken date** defaults to system date. The **Action Taken date** appears in Block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
  - a) Check the **Action Dt Ovrd** box.
  - b) Change Action Taken date.
  - c) Uncheck the **Action Dt Ovrd** box.
- 2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in Block 50 of the SF-50. To change (if necessary):
  - a) Check the **Override Operator Emplid** box.
  - b) Enter the required approving official in the **Emplid of Tracking Row** field. <u>DO NOT</u> uncheck **Override Operator Emplid** box.

# □ Job

- 1. Delete the **Position**.
- 2. Tab this will remove prior position information.
- 3. Enter the **Position** (**Job Code**, **Agency**, **Sub-Agency**, **Department**, and **Location** will default from Position Data.)
- 4. Tab this will refresh with new position information.

# **Compensation**

1. Enter **Step**.

### ☐ Return to Data Control

- 1. Save.
- 2. Print SF-52 and review for accuracy.
- 3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
- 4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

# Administer Workforce > Administer Workforce (USF) > Use > Request Action

- 1. Click on Correct History
- 2. Select Employee.
- 3. Make necessary corrections, delete row (-) or change **PAR Status** to **PRO**.
- 4. Save.

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# 5.7 Change in Retirement Plan

# **Step 1 Process Personnel Action**

Administer Workforce > Administer Workforce (USF) > Use > Request Action

### □Data Control

- 1. Select Employee.
- 2. Insert a row (+).
- 3. Enter the **Actual Effective Date**. **PAR Status** defaults to *REQ*.
- 4. Select Action.
- 5. Select Reason Code.
- 6. Enter the **NOA Code**.
- 7. Enter Authority#1 and/or Authority #2; if the authority requires inserts, enter them within the space provided to the right of the Authority Code field or as part of the actual Authority Code text.

#### PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the < or > arrows bar to view remarks.

#### Tracking Data

- 1. **Action Taken date** defaults to system date. The **Action Taken date** appears in Block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
  - a) Check the Action Dt Ovrd box.
  - b) Change Action Taken date.
  - c) Uncheck the **Action Dt Ovrd** box.
- 2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in Block 50 of the SF-50. To change (if necessary):
  - a) Check the **Override Operator Emplid** box.
  - b) Enter the required approving official in the **Emplid of Tracking Row** field. <u>DO NOT</u> uncheck **Override Operator Emplid** box.

### □.Job

### FEGLI/Retirement/FICA

- 1. Change **Retirement Plan**.
- 2. Change FERS Coverage.
- 3. Change Previous Retirement Coverage.
- 4. Review/Change Annuitant Indicator.
- 5. Enter Annuity Commencement Date, if applicable.
- 6. Enter **CSRS Frozen Service** data if applicable.

# **Employment 1**

1. Enter the **TSP** if blank. This date should not be prior to 1/1/84. This field is mandatory for FERS employees. Leave blank for CSRS employees.

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# ☐ Return to Data Control

- 1. Save.
- 2. Print SF-52 and review for accuracy.
- 3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
- 4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

# Administer Workforce > Administer Workforce (USF) > Use > Request Action

- 1. Click on Correct History
- 2. Select Employee.
- 3. Make necessary corrections, delete row (-) or change PAR Status to PRO.
- 4. Save.

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# 5.8 Change in Tenure

# **Step 1 Process Personnel Action**

Administer Workforce > Administer Workforce (USF) > Use > Request Action

### □Data Control

- 1. Select Employee.
- 2. **Insert** a row (+).
- 3. Enter the **Actual Effective Date**. **PAR Status** defaults to *REQ*.
- 4. Select Action.
- 5. Select Reason Code.
- 6. Enter the **NOA Code**.
- 7. Enter **Authority#1 and/or Authority #2**; if the authority requires inserts, enter them within the space provided to the right of the **Authority Code** field or as part of the actual **Authority Code** text.

#### PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the < or > arrows to view remarks.

# Tracking Data

- 1. **Action Taken date** defaults to system date. The **Action Taken date** appears in Block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
  - a) Check the **Action Dt Ovrd** box.
  - b) Change Action Taken date.
  - c) Uncheck the Action Dt Ovrd box.
- 2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in Block 50 of the SF-50. To change (if necessary):
  - a) Check the **Override Operator Emplid** box.
  - b) Enter the required approving official in the **Emplid of Tracking Row** field. <u>DO NOT</u> uncheck **Override Operator Emplid** box.

### **Position Data**

1. Change **Type Appt** if necessary. Other data is grayed-out and defaults from position information.

# **Employment 1**

1. Career Conv Date autopopulates with effective date of action.

# **Employment 2**

1. Change **Tenure**.

<u>NOTE</u>: Make sure the proper relationship exists between **NOA** Code, Type Appt, Posn Occupied, and Tenure (Position Data page).

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# ☐ Return to Data Control

- 1. Save.
- 2. Print SF-52 and review for accuracy.
- 3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
- 4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

# Administer Workforce > Administer Workforce (USF) > Use > Request Action

- 1. Click on Correct History
- 2. Select Employee.
- 3. Make necessary corrections, delete row (-) or change PAR Status to PRO.
- 4. Save.

POSN OCCUPIED	TENURE CODE	TYPE APPT	AUTHORITY CODE 1 or 2	ACTION
1 - Competitive	2	15		Change in Tenure
2 - Excepted	2	30,32,34,38	IS NOT - J8M, WTM, WUM	Change in Tenure
2 - Excepted	2	30, 38	IS - J8M, WTM, WUM	Conversion to Competitive Service

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# 5.9 Change in Veterans Preference for RIF

# **Step 1 Process Personnel Action**

Administer Workforce > Administer Workforce (USF) > Use > Request Action

### □Data Control

- 1. Select Employee.
- 2. **Insert** a row (+).
- 3. Enter the Actual Effective Date. PAR Status defaults to REQ.
- 4. Select Action.
- 5. Select **Reason Code**.
- 6. Enter the **NOA Code**.
- 7. Enter Authority#1 and/or Authority #2; if the authority requires inserts, enter them within the space provided to the right of the Authority Code field or as part of the actual Authority Code text.

#### PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the < or > arrows bar to view remarks.

#### Tracking Data

- 1. **Action Taken date** defaults to system date. The **Action Taken date** appears in Block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
  - a) Check the **Action Dt Ovrd** box.
  - b) Change Action Taken date.
  - c) Uncheck the **Action Dt Ovrd** box.
- 2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in Block 50 of the SF-50. To change (if necessary):
  - a) Check the **Override Operator Emplid** box.
  - b) Enter the required approving official in the **Emplid of Tracking Row** field. <u>DO NOT</u> uncheck **Override Operator Emplid** box.

#### Personal Data

#### Veterans Info

**NOTE:** Refer to Guide to Processing Personnel Actions (Chapters 4 and 7) for a detailed explanation.

- . Enter applicable information. Veterans Preference (1, 2, 3, 4, 5 or 6) and Veterans Pref RIF (Y/N).
  - ⇒ If Veterans Preference is changed to code 2, 3, 4, 5, or 6, Veterans Pref RIF should equal Yes.
  - $\Rightarrow$  If **Pay Plan** is *ES* or *EX*, **Veterans Pref RIF** must equal No.
  - ⇒ If **Type Appt** is 34 or 44, (Sch C), **Veterans Pref RIF** must equal No.
  - $\Rightarrow$  If Nature of Action is IXX, then Veterans Status may not be "N."

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- 1. Save.
- 2. Print SF-52 and review for accuracy.
- 3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
- 4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** the following path:

# Administer Workforce > Administer Workforce (USF) > Use > Request Action

- 1. Click on Correct History.
- 2. Select Employee.
- 3. Make necessary corrections, delete row (-) or change **PAR Status** to **PRO**.
- 4. Save.

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# 5.10 Change Fund Type/B&R Code

# **Step 1 Process Personnel Action**

Administer Workforce > Administer Workforce (USF) > Use > Request Action

### **□**Data Control

- 1. Select Employee.
- 2. **Insert** a row (+).
- 3. Enter the **Actual Effective Date**. **PAR Status** defaults to *REQ*.
- 4. Select Action.
- 5. Select **Reason Code**.
- 6. Enter the **NOA Code**.

#### PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the < or > arrows to view remarks.

#### Tracking Data

- 1. **Action Taken date** defaults to system date. The **Action Taken date** appears in Block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
  - a) Check the Action Dt Ovrd box.
  - b) Change Action Taken date.
  - c) Uncheck the **Action Dt Ovrd** box.
- 2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in Block 50 of the SF-50. To change (if necessary):
  - a) Check the **Override Operator Emplid** box.
  - b) Enter the required approving official in the **Emplid of Tracking Row** field. <u>DO NOT</u> uncheck **Override Operator Emplid** box.

## **Compensation**

#### Accounting Info

1. Enter Appropriation Code in the **Account** field.

- 1. Save.
- 2. Print SF-52 and review for accuracy.
- 3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
- 4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

# Administer Workforce > Administer Workforce (USF) > Use > Request Action

- 1. Click on Correct History
- 2. Select Employee.
- 3. Make necessary corrections, delete row (-) or change PAR Status to PRO.
- 4. Save.

# **5.11 Change in Hours**

# **Step 1 Modify Position**

Develop Workforce > Manage Positions (USF) > Use > Position Data

# **Description**

- 1. Select **Position**.
- 2. **Insert** a Row (+).
- 3. **Effective Date** and **Status Date** should be on or before the effective date of the action.
- 4. Select Reason.

#### □Job Information

- 1. Change **Standard Hours/Weekly**. The **Standard Work Days** will default based on the **Standard Hours**, do not change.
- 2. Save.

# **Step 2 Process Personnel Action**

Administer Workforce > Administer Workforce (USF) > Use > Request Action

## **□**Data Control

- 1. Select Employee.
- 2. **Insert** a row (+).
- 3. Enter the **Actual Effective Date**. **PAR Status** defaults to *REQ*.
- 4. Select Action.
- 5. Select Reason Code.
- 6. Enter the **NOA Code**.
- 7. Enter Authority#1 and/or Authority #2; if the authority requires inserts, enter them within the space provided to the right of the Authority Code field or as part of the actual Authority Code text.

#### PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the < or > arrows to view remarks.

### Tracking Data

- 1. **Action Taken date** defaults to system date. The **Action Taken date** appears in Block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
  - a) Check the **Action Dt Ovrd** box.
  - b) Change Action Taken date.
  - c) Uncheck the **Action Dt Ovrd** box.
- 2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in Block 50 of the SF-50. To change (if necessary):
  - a) Check the **Override Operator Emplid** box.
  - b) Enter the required approving official in the **Emplid of Tracking Row** field. <u>DO NOT</u> uncheck **Override Operator Emplid** box.

#### □.Job

- 1. Delete the **Position**.
- 2. Tab this will remove prior position information.
- 3. Enter the **Position** (**Job Code**, **Agency**, **Sub-Agency**, **Department**, and **Location** will default from Position Data).
- 4. Tab this will refresh with new position information.

#### **□**Position

1. Verify **Standard Hours**.

# **Compensation**

1. Enter **Step**.

#### ☐ Return to Data Control

- 1. Save.
- 2. Print SF-52 and review for accuracy.
- 3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
- 4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

### Administer Workforce > Administer Workforce (USF) > Use > Request Action

- 1. Click on Correct History.
- 2. Select Employee.
- 3. Make necessary corrections, delete row (-) or change PAR Status to PRO.
- 4. Save.

# 5.12 Change in Work Schedule

# **Step 1 Modify Position**

Develop Workforce > Manage Positions (USF) > Use > Position Data

# **Description**

- 1. Select the **Position**.
- 2. **Insert** a Row (+).
- 3. **Effective Date** and **Status Date** should be on or before the effective date of the action.
- 4. Select **Reason**.

#### □Job Information

1. Review/Change **Standard Hours/Weekly**. The **Standard Work Days** will default based on the **Standard Hours**, do not change.

#### Federal Data

1. Change **Work Schedule**. Once entered the appropriate schedule will default the Full/Part-Time field on the Job Information page.

# ☐ Return to Description

1. Save.

# **Step 2 Process Personnel Action**

Administer Workforce > Administer Workforce (USF) > Use > Request Action

#### □Data Control

- 1. Select Employee.
- 2. **Insert** a row (+).
- 3. Enter the **Actual Effective Date**. **PAR Status** defaults to *REQ*.
- 4. Select Action.
- 5. Select Reason Code.
- 6. Enter the **NOA Code**.
- 7. Enter Authority#1 and/or Authority #2; if the authority requires inserts, enter them within the space provided to the right of the Authority Code field or as part of the actual Authority Code text.

#### PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the < or > arrows to view remarks.

### Tracking Data

- 1. **Action Taken date** defaults to system date. The **Action Taken date** appears in Block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
  - a) Check the **Action Dt Ovrd** box.
  - b) Change Action Taken date.
  - c) Uncheck the **Action Dt Ovrd** box.
- 2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in Block 50 of the SF-50. To change (if necessary):
  - a) Check the **Override Operator Emplid** box.
  - b) Enter the required approving official in the **Emplid of Tracking Row** field. <u>DO NOT</u> uncheck **Override Operator Emplid** box.

# □Job

- 1. Delete the **Position**.
- 2. Tab this will remove prior position information.
- 3. Enter the **Position** (**Job Code**, **Agency**, **Sub-Agency**, **Department**, and **Location** will default from Position Data).
- 4. Tab this will refresh with new position information.

#### **□**Position

1. Verify Work Schedule and Standard Hours.

# **Compensation**

1. Enter Step.

#### Return to Data Control

- 1. Save.
- 2. Print SF-52 and review for accuracy.
- 3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
- 4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

# Administer Workforce > Administer Workforce (USF) > Use > Request Action

- 1. Click on Correct History.
- 2. Select Employee.
- 3. Make necessary corrections, delete row (-) or change PAR Status to PRO.
- 4. Save

# **5.13 Change in Duty Station**

# **Step 1 Modify Position**

Develop Workforce > Manage Positions (USF) > Use > Position Data

# **Description**

- 1. Select the **Position**.
- 2. **Insert** a Row (+).
- 3. **Effective Date** and **Status Date** should be on or before the effective date of the action.
- 4. Select **Reason**.

#### **US Federal**

- 1. Review Competitive Area, change if necessary.
- 2. Review Competitive Level, change if necessary.

### **□**Work Location

1. Enter **Location Code** and tab (Click on the magnifying glass to search).

# ☐ Return to Description

1. Save.

# **Step 2 Process Personnel Action**

Administer Workforce > Administer Workforce (USF) > Use > Request Action

### **□**Data Control

- 1. Select Employee.
- 2. **Insert** a row (+).
- 3. Enter the Actual Effective Date. PAR Status defaults to REQ.
- 4. Select Action.
- 5. Select Reason Code.
- 6. Enter the **NOA Code**.
- 7. Enter Authority#1 and/or Authority #2; if the authority requires inserts, enter them within the space provided to the right of the Authority Code field or as part of the actual Authority Code text.

#### PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the < or > arrows to view remarks.

#### Tracking Data

- 1. **Action Taken date** defaults to system date. The **Action Taken date** appears in Block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
  - a) Check the **Action Dt Ovrd** box.
  - b) Change Action Taken date.
  - c) Uncheck the **Action Dt Ovrd** box.
- 2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in Block 50 of the SF-50. To change (if necessary):
  - a) Check the Override Operator Emplid box.
  - b) Enter the required approving official in the **Emplid of Tracking Row** field. <u>DO NOT</u> uncheck **Override Operator Emplid** box.

#### □Job

- 1. Delete the **Position**.
- 2. Tab this will remove prior position information.
- 3. Enter the **Position** (**Job Code**, **Agency**, **Sub-Agency**, **Department**, and **Location** will default from Position Data.)
- 4. Tab this will refresh with new position information.

# **Compensation**

1. Enter **Step**.

# **Employment 2**

- 1. Review/Change **Permanent Data RIF Competitive Area** and **Competitive Level**. <u>Note</u>: Should be the same as Position Data Record, unless employee is on a temporary promotion.
- 2. Pay Change Date will autopopulate with effective date of action if there is a positive or negative affect on Base Pay.

#### Return to Data Control

- 1. Save.
- 2. Print SF-52 and review for accuracy.
- 3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
- 4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

# Administer Workforce > Administer Workforce (USF) > Use > Request Action

- 1. Click on Correct History
- 2. Select Employee.
- 3. Make necessary corrections, delete row (-) or change **PAR Status** to **PRO**.
- 4. Save.

# 5.14 Name Change

<u>NOTE</u>: This procedure should <u>not</u> be used to correct an action that was processed with an error in the name fields.

# **Step 1 Process Personnel Action**

Administer Workforce > Administer Workforce (USF) > Use > Request Action

### **□**Data Control

- 1. Select Employee.
- 2. **Insert** a row (+).
- 3. Enter the **Actual Effective Date**. **PAR Status** defaults to *REQ*.
- 4. Select Action.
- 5. Select Reason Code.
- 6. Enter the **NOA Code**.
- 7. Enter Authority#1 and/or Authority #2; if the authority requires inserts, enter them within the space provided to the right of the Authority Code field or as part of the actual Authority Code text.

#### PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the < or > arrows to view remarks.

#### Tracking Data

- 1. **Action Taken date** defaults to system date. The **Action Taken date** appears in Block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
  - a) Check the **Action Dt Ovrd** box.
  - b) Change Action Taken date.
  - c) Uncheck the **Action Dt Ovrd** box.
- 2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in Block 50 of the SF-50. To change (if necessary):
  - a) Check the **Override Operator Emplid** box.
  - b) Enter the required approving official in the **Emplid of Tracking Row** field. <u>DO NOT</u> uncheck **Override Operator Emplid** box.

#### Personal Data

- 1. Type new name over old name.
- 2. If personal phone numbers need to be updated, refer to the section entitled "Correcting Personal Phone Numbers" under "Basic Operations/Functions."

- 1. Save.
- 2. Print SF-52 and review for accuracy.
- 3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
- 4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** with the following path:

# Administer Workforce > Administer Workforce (USF) > Use > Request Action

- 1. Click on Correct History
- 2. Select Employee.
- 3. Make necessary corrections, delete row (-) or change PAR Status to PRO.
- 4. Save.

<u>NOTE</u>: Once action is saved, the new name will not appear until you cancel out of the action and select the employee from the database with the new name.

# **5.15** Change in Service Computation Date

THIS PROCEDURE ONLY APPLIES TO THE SCD THAT APPEARS IN BLOCK 31 OF THE SF-50. IF YOU ARE CHANGING ANY OTHER SCD, PROCESS A "966" ACTION.

# **Step 1 Process Personnel Action**

Administer Workforce > Administer Workforce (USF) > Use > Request Action

#### □Data Control

- 1. Select Employee.
- 2. **Insert** a row (+).
- 3. Enter the **Actual Effective Date**. **PAR Status** defaults to *REQ*.
- 4. Select Action.
- 5. Select Reason Code.
- 6. Enter the **NOA Code**.
- 7. Enter **Authority#1 and/or Authority #2**; if the authority requires inserts, enter them within the space provided to the right of the **Authority Code** field or as part of the actual **Authority Code** text.

#### PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the < or > arrows to view remarks.

#### Tracking Data

- 1. **Action Taken date** defaults to system date. The **Action Taken date** appears in Block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
  - a) Check the **Action Dt Ovrd** box.
  - b) Change Action Taken date.
  - c) Uncheck the **Action Dt Ovrd** box.
- 2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in Block 50 of the SF-50. To change (if necessary):
  - a) Check the Override Operator Emplid box.
  - b) Enter the required approving official in the **Emplid of Tracking Row** field. <u>DO NOT</u> uncheck **Override Operator Emplid** box.

# **Employment 1**

1. Change the **Leave** date and other **Service Computation Dates** as appropriate. See information on "Using the SCD Calculator" under "Basic Operations/Functions."

- 1. Save.
- 2. Print SF-52 and review for accuracy.
- 3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
- 4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

# Administer Workforce > Administer Workforce (USF) > Use > Request Action

- 1. Click on Correct History
- 2. Select Employee.
- 3. Make necessary corrections, delete row (-) or change PAR Status to PRO.
- 4. Save.

# 5.16 FEGLI Change

# **Step 1 Process Personnel Action**

Administer Workforce > Administer Workforce (USF) > Use > Request Action

### □Data Control

- 1. Select Employee.
- 2. **Insert** a row (+).
- 3. Enter the Actual Effective Date. PAR Status defaults to REQ.
- 4. Select Action.
- 5. Select **Reason Code**.
- 6. Enter the **NOA Code**.
- 7. Enter Authority#1 and/or Authority #2; if the authority requires inserts, enter them within the space provided to the right of the Authority Code field or as part of the actual Authority Code text.

#### PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the < or > arrows to view remarks.

### Tracking Data

- 1. **Action Taken date** defaults to system date. The **Action Taken date** appears in Block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
  - a) Check the **Action Dt Ovrd** box.
  - b) Change Action Taken date.
  - c) Uncheck the **Action Dt Ovrd** box.
- 2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in Block 50 of the SF-50. To change (if necessary):
  - a) Check the **Override Operator Emplid** box.
  - b) Enter the required approving official in the **Emplid of Tracking Row** field. <u>DO NOT</u> uncheck **Override Operator Emplid** box.

### **□**Job

#### FEGLI/Retirement/FICA

1. Enter **FEGLI Code**.

- 1. Save.
- 2. Print SF-52 and review for accuracy.
- 3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
- 4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

# Administer Workforce > Administer Workforce (USF) > Use > Request Action

- 1. Click on Correct History.
- 2. Select Employee.
- 3. Make necessary corrections, delete row (-) or change PAR Status to PRO.
- 4. Save.

# 5.17 Suspension NTE or Suspension Indefinite

# **Step 1 Process Personnel Action**

Administer Workforce > Administer Workforce (USF) > Use > Request Action

### □Data Control

- 1. Select Employee.
- 2. **Insert** a row (+).
- 3. Enter the **Actual Effective Date** and **Not to Exceed Date** if appropriate. **PAR Status** defaults to *REQ*.
- 4. Select Action.
- 5. Select Reason Code.
- 6. Enter the **NOA Code**.
- 7. Enter **Authority#1 and/or Authority #2**; if the authority requires inserts, enter them within the space provided to the right of the **Authority Code** field or as part of the actual **Authority Code** text.

#### PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the < or > arrows to view remarks.

#### Tracking Data

- 1. **Action Taken date** defaults to system date. The **Action Taken date** appears in Block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
  - a) Check the **Action Dt Ovrd** box.
  - b) Change Action Taken date.
  - c) Uncheck the **Action Dt Ovrd** box.
- 2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in Block 50 of the SF-50. To change (if necessary):
  - a) Check the **Override Operator Emplid** box.
  - b) Enter the required approving official in the **Emplid of Tracking Row** field. <u>DO NOT</u> uncheck **Override Operator Emplid** box.

# **Employment 2**

#### Non Pay Data

1. Enter Last Date Worked.

- 1. Save.
- 2. Print SF-52 and review for accuracy.
- 3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
- 4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

# Administer Workforce > Administer Workforce (USF) > Use > Request Action

- 1. Click on Correct History
- 2. Select Employee.
- 3. Make necessary corrections, delete row (-) or change PAR Status to PRO.
- 4. Save.

# 5.18 Leave Without Pay

# **Step 1 Process Personnel Action**

Administer Workforce > Administer Workforce (USF) > Use > Request Action

### **□**Data Control

- 1. Select Employee.
- 2. **Insert** a row (+).
- 3. Enter the Actual Effective Date and Not to Exceed Date. PAR Status defaults to REQ.
- 4. Select **Action**.
- 5. Select **Reason Code**.
- 6. Enter the **NOA Code**.
- 7. Enter Authority#1 and/or Authority #2; if the authority requires inserts, enter them within the space provided to the right of the Authority Code field or as part of the actual Authority Code text.

#### PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the < or > arrows to view remarks.

#### Tracking Data

- 1. **Action Taken date** defaults to system date. The **Action Taken date** appears in Block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
  - a) Check the **Action Dt Ovrd** box.
  - b) Change Action Taken date.
  - c) Uncheck the **Action Dt Ovrd** box.
- 2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in Block 50 of the SF-50. To change (if necessary):
  - a) Check the **Override Operator Emplid** box.
  - a) Enter the required approving official in the **Emplid of Tracking Row** field. <u>DO NOT</u> uncheck **Override Operator Emplid** box.

# **Employment 2**

#### Non Pay Data

1. Enter Last Day Worked.

- 1. Save.
- 2. Print SF-52 and review for accuracy.
- 3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
- 4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

# Administer Workforce > Administer Workforce (USF) > Use > Request Action

- 1. Click on Correct History
- 2. Select Employee.
- 3. Make necessary corrections, delete row (-) or change PAR Status to PRO.
- 4. Save.

# 5.19 Extension of Leave Without Pay

# **Step 1 Process Personnel Action**

Administer Workforce > Administer Workforce (USF) > Use > Request Action

#### **□**Data Control

- 1. Select Employee.
- 2. **Insert** a row (+).
- 3. Enter the Actual Effective Date and Not to Exceed Date. PAR Status defaults to REO.
- 4. Select **Action**.
- 5. Select Reason Code.
- 6. Enter the **NOA Code**.
- 7. Enter **Authority#1 and/or Authority #2**; if the authority requires inserts, enter them within the space provided to the right of the **Authority Code** field or as part of the actual **Authority Code** text.

#### PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the < or > arrows to view remarks.

#### Tracking Data

- 1. **Action Taken date** defaults to system date. The **Action Taken date** appears in Block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
  - a) Check the **Action Dt Ovrd** box.
  - b) Change Action Taken date.
  - c) Uncheck the **Action Dt Ovrd** box.
- 2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in Block 50 of the SF-50. To change (if necessary):
  - a) Check the **Override Operator Emplid** box.
  - b) Enter the required approving official in the **Emplid of Tracking Row** field. <u>DO NOT</u> uncheck **Override Operator Emplid** box.

## ☐ Return to Data Control

- 1. Save.
- 2. Print SF-52 and review for accuracy.
- 3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
- 4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

## Administer Workforce > Administer Workforce (USF) > Use > Request Action

- 1. Click on Correct History
- 2. Select Employee.
- 3. Make necessary corrections, delete row (-) or change PAR Status to PRO.
- 4. Save.

# 5.20 Return to Duty

# **Step 1 Process Personnel Action**

Administer Workforce > Administer Workforce (USF) > Use > Request Action

#### □Data Control

- 1. Select Employee.
- 2. **Insert** a row (+).
- 3. Enter the **Actual Effective Date**. **PAR Status** defaults to *REQ*.
- 4. Select **Action**.
- 5. Select **Reason Code**.
- 6. Enter the **NOA Code**.
- 7. Enter **Authority#1 and/or Authority #2**; if the authority requires inserts, enter them within the space provided to the right of the **Authority Code** field or as part of the actual **Authority Code** text.

#### PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the < or > arrows to view remarks.

#### Tracking Data

- 1. **Action Taken date** defaults to system date. The **Action Taken date** appears in Block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
  - a) Check the **Action Dt Ovrd** box.
  - b) Change Action Taken date.
  - c) Uncheck the **Action Dt Ovrd** box.
- 2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in Block 50 of the SF-50. To change (if necessary):
  - a) Check the **Override Operator Emplid** box.
  - b) Enter the required approving official in the **Emplid of Tracking Row** field. <u>DO NOT</u> uncheck **Override Operator Emplid** box.

# **Employment 1**

- 1. Review the **Service Computation Dates** and change if necessary.
- 2. If LWOP is in excess of allowable amount, enter recalculated Leave date.
- 3. Adjust **WGI Due Dt** if LWOP affected the waiting period. To adjust click on the **Manual** button in the Override Box and make a change to the **WGI Due Dt**. <u>DO NOT</u> deselect the **Manual** button.

# **Employment 2**

#### Non Pay Data

- 1. If applicable enter **Non Pay Hours** for **SCD**, **Probation**, or **Tenure** (optional use).
- 2. The **Last Day Worked** date that was entered on the LWOP action will clear once the RTD action is saved.

- 1. Save.
- 2. Print SF-52 and review for accuracy.
- 3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
- 4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

# Administer Workforce > Administer Workforce (USF) > Use > Request Action

- 1. Click on Correct History.
- 2. Select Employee.
- 3. Make necessary corrections, delete row (-) or change PAR Status to PRO.
- 4. Save.

# 5.21 Conversion/Conversion NTE

# **Step 1 Create or Modify Position**

- A. If you are re-using an old Position, refer to the section on "Modifying Position" under "Position Information."
- B. If the Position does not exist, refer to the section on "Creating a Position" under "Position Information."

# **Step 2 Process Personnel Action**

Administer Workforce > Administer Workforce (USF) > Use > Request Action

### **□**Data Control

- 1. Select Employee.
- 2. **Insert** a row (+).
- 3. Enter the **Actual Effective Date** and **Not to Exceed Date** if appropriate. **PAR Status** defaults to *REQ*.
- 4. Select **Action**.
- 5. Select Reason Code.
- 6. Enter the **NOA Code**.
- 7. Enter Authority#1 and/or Authority #2; if the authority requires inserts, enter them within the space provided to the right of the Authority Code field or as part of the actual Authority Code text.

#### PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the < or > arrows to view remarks.

#### Tracking Data

- 1. **Action Taken date** defaults to system date. The **Action Taken date** appears in Block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
  - a) Check the **Action Dt Ovrd** box.
  - b) Change Action Taken date.
  - c) Uncheck the **Action Dt Ovrd** box.
- 2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in Block 50 of the SF-50. To change (if necessary):
  - a) Check the **Override Operator Emplid** box.
  - b) Enter the required approving official in the **Emplid of Tracking Row** field. <u>DO NOT</u> uncheck **Override Operator Emplid** box.

### **□**Job

- 1. Delete the **Position**.
- 2. Tab this will remove prior position information.
- 3. Enter the **Position**. (**Job Code**, **Agency**, **Sub-Agency**, **Department**, and **Location** will default from Position Data.)
- 4. Tab this will refresh with new position information.

#### Benefits/FEHB Data

- 1. Review/Change the Benefit Program.
- 2. Review/Change **FEHB Eligibility**. **NOTE**: This field is a required field for new appointments and must also be changed if conversion action is from a temporary to permanent position.

#### FEGLI/Retirement/FICA

- 1. Review/Change FEGLI Code.
- 2. Review/Change Retirement Plan.
- 3. Review/Change FERS Coverage.
- 4. Review/Change Previous Retirement Coverage.
- 5. Review/Change Annuitant Indicator.
- 6. Enter Annuity Commencement Date, if applicable.
- 7. Enter **CSRS Frozen Service** data if applicable.

### **Position Data**

1. Review/Change **Type Appt**; other data is grayed out and defaults from position information.

NOTE: See Relationship Edits Between NOA Code, Type Appt, Posn Occupied, and Tenure that follows the Hire procedure.

# **Compensation**

- 1. Review/Change Pay Rate Determinant.
- 2. Enter **Step**. The **Step Entry Date** and **Grade Entry Date** defaults to reflect the effective date of the action. These dates represent entry dates in CHRIS and they are not editable.
- 3. If employee is on retained grade or pay, enter applicable information.
- 4. Enter **Annuity Offset Amount** if necessary. (This amount should be monthly amount).

#### Other Pay Information

1. Review/Change/Enter **Earnings Code** if appropriate. Based on selection of **Earnings Code**, you may be required to enter the **Pay Period Amount**. If more than one earnings code is required, insert a row (+) in the **Earnings Code** field.

#### Accounting Info

1. Review/Change Appropriation Code in the **Account** field.

# **Employment 1**

- 1. The **Pay Chg Dt** will autopopulate with the effective date of the action unless the Base Pay and Locality/LEO Adjustment does not equal the corresponding fields on the prior non-canceled row.
- Before processing a Conversion action, determine if this action results in an equivalent increase for the
  employee. Since all Conversion actions do not result in an equivalent increase, the Last Equivalent
  Increase (LEI) date does not automatically default to the effective date of a Conversion action.
  Manually change the LEI Date. Once the LEI Date is changed, the WGI Due date will automatically
  populate.

In some cases, the LEI date will be correct, the WGI Due date will be blank, and the WGI Status will be set to N/A. (This will occur if the employee's previous appointment did not allow WGIs.) If so, delete the LEI date, tab out of the field, and re-enter the LEI date. Verify that the WGI Due date calculated correctly.

#### Appointment Data

- 1. **Nature of Action Code** and **Curr Appt Authorities** will update with new appointment information when action is saved in an PRO **PAR Status**.
- 2. Enter Special Employment Pgm if applicable.

# **Employment 2**

- 1. Enter appropriate **Probation Dates: Probation Date, SES Probation, Supv/Manager Probation.**These dates should be completion dates of probation periods. Enter date completed if probationary period has already been served. Leave blank if not subject to a probationary period.
- 2. Review/Change Last Promo Date.
- 3. Enter **Retained Grade Expires** dates if applicable.
- 4. Review/Change **Permanent RIF Data**. <u>Note</u>: Should be the same as Position Data Record unless employee is on a temporary promotion. Leave blank for pay plans EX, ES, EF, ED and EI.
- 5. Review/Change **Tenure Group**. <u>Note</u>: Make sure the proper relationship exists between NOA Code, **Type Appt, Posn Occupied**, and **Tenure** (Position Data page).

#### Security Info

- 1. Review/Change Security Clearance, Status, and Status Dt.
- 2. Indicate if a **Financial Disclosure** is required.

### ☐ Return to Data Control

- 1. Save.
- 2. Print SF-52 and review for accuracy.
- 3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
- 4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

#### Administer Workforce > Administer Workforce (USF) > Use > Request Action

- 1. Click on Correct History.
- 2. Select Employee.

- 3. Make necessary corrections, delete row (-) or change **PAR Status** to **PRO**.
- 4. Save.

**EMPLOYEE REVIEW INFORMATION:** Additional Performance Requirements for an Employee Who Moves into an ES position: When an employee moves into an ES position from a different Pay Plan such as GS, GM, SL, ST, EJ or EK) three new performance records may be required in CHRIS if the employee receives a rating for their prior position following the effective date of their conversion. A new record will be needed for each of the following:

#### Record 1:

A new record for the conversion action to change the employee's Rating Pattern and Rating Level. In the above example the Review Date is the effective date of the conversion, the Rating Pattern is "F" and the Rating Scale is "X=Not rated." If Review From and To Dates carry forward from prior performance record, delete these dates on this new record. This record must be added when the conversion action is changed to PRO using the following path: Administer Workforce > Manage Performance (USF) > Use > Review Rating.

#### Record 2:

A new record to add the performance appraisal given to the employee for the prior position occupied.

#### Record 3:

A new record to change the Rating Pattern back to "F" and Rating Level back to "X=Not Rated" (if the effective date for Record 2 above is later than the conversion to the SES position). The Review Date for this record will be the day following the Review Date for the performance appraisal for the prior position (Record 2 above).

It is necessary to add these additional performance records because OPM has added a CPDF edit to ensure that ES employees have a valid Rating Pattern. The correct Rating Pattern for ES employees in DOE is "F."

**NOTE:** Once old position becomes vacant, follow procedure under "Position Information" tab to inactivate it.

# **5.22 Position Change**

# **Step 1 Create or Modify Position**

- A. If you are re-using an old Position, refer to the section on "Modifying Position" under "Position Information."
- B. If the Position does not exist, refer to the section on "Creating a Position" under "Position Information."

# **Step 2 Process Personnel Action**

Administer Workforce > Administer Workforce (USF) > Use > Request Action

### **□**Data Control

- 1. Select Employee.
- 2. **Insert** a row (+).
- 3. Enter the **Actual Effective Date**. **PAR Status** defaults to *REQ*.
- 4. Enter **Not to Exceed Date** if applicable.
- 5. Select **Action**.
- 6. Select Reason Code.
- 7. Enter the **NOA Code**.
- 8. Enter **Authority#1 and/or Authority #2**; if the authority requires inserts, enter them within the space provided to the right of the **Authority Code** field or as part of the actual **Authority Code** text.

#### PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the < or > arrows to view remarks.

#### **Tracking Data**

- 1. **Action Taken date** defaults to system date. The **Action Taken date** appears in Block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
  - a) Check the Action Dt Ovrd box.
  - b) Change Action Taken date.
  - c) Uncheck the **Action Dt Ovrd** box.
- 2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in Block 50 of the SF-50. To change (if necessary):
  - a) Check the **Override Operator Emplid** box.
  - b) Enter the required approving official in the **Emplid of Tracking Row** field. <u>DO NOT</u> uncheck **Override Operator Emplid** box.

# □Job

- 1. Delete the **Position**.
- 2. Tab this will remove prior position information.
- 3. Enter the **Position** (**Job Code**, **Agency**, **Sub-Agency**, **Department**, and **Location** will default from Position Data.)
- 4. Tab this will refresh with new position information.

### **Position Data**

1. Enter **Type Appt**; other data is grayed out and defaults from position information.

# **Compensation**

- 1. Review/Change Pay Rate Determinant.
- 2. Enter **Step**. The **Step Entry Date** and **Grade Entry Date** defaults to reflect the effective date of the action if different from previous row.
- 3. If employee is on retained grade or pay, enter applicable information.

#### Other Pay Information

1. Enter Earnings Code if appropriate. Based on selection of Earnings Code, you may be required to enter the Pay Period Amount. If more than one earnings code is required, insert a row in the Earnings Code field.

#### Accounting Info

1. Enter Appropriation Code in the **Account** field.

# **Employment 1**

- 1. The **Pay Chg Dt** will autopopulate with the effective date of the action unless the Base Pay and Locality/LEO Adjustment does not equal the corresponding fields on the prior non-canceled row.
- 2. Review/Change LEI Date.

# **Employment 2**

- 1. Enter appropriate **Probation Dates: Probation Date, SES Probation, Supv/Manager Probation.**These dates should be completion dates of probation periods. Enter date completed if probationary period has already been served. Leave blank if not subject to a probationary period.
- 2. Enter **Retained Grade Expires** dates as appropriate.
- 3. Review/Change **Permanent Data RIF**. <u>Note</u>: Should be same as the Position Data Record unless the employee is on a temporary promotion. Leave blank for pay plans EX, ES, EF, ED and EI.
- 4. Review/Change Last Promotion Date, if a positive change in grade.

#### Security Info

- 1. Review/Change Security Clearance, Status, and Status Dt.
- 2. Indicate if a Financial Disclosure is required.

- 1. Save.
- 2. Print SF-52 and review for accuracy.
- 3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
- 4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

# Administer Workforce > Administer Workforce (USF) > Use > Request Action

- 1. Click on Correct History
- 2. Select Employee.
- 3. Make necessary corrections, delete row (-) or change PAR Status to PRO.
- 4. Save.

**NOTE:** Once old position becomes vacant, follow procedure under "Position Information" tab to inactivate it.

# 5.23 Non SF-50 Change/Correction -NOA Code - 966

#### **Important:**

This action is only used for changing/correcting data elements that <u>DO NOT appear on a SF-50</u>. All data elements that appear on the SF-50 will be grayed out when this NOA Code is selected. Verify whether this change/correction will effect the SF-50; if so, a NOA Code "002" correction will need to be processed. If data you are changing/correcting effects the position, you must first make the appropriate change/correction on the position data by inserting a new row.

# DO NOT CHANGE THE LEI DATE WHEN PROCESSING A 966 ACTION TO PROJECT THE WGI DUE DATE DUE TO EXCESS LWOP.

The LEI Date should reflect the last equivalent increase that the employee received (last WGI, last promotion). Generally, you would only manually change the LEI date when someone is changed to lower grade after serving a temporary promotion (to reflect the date of the last equivalent increase employee received while in their permanent position); when someone is converted from a pay plan that didn't have a WGI waiting period; when making a temporary promotion permanent; or when gaining employees from other agencies when the LEI may need changed from the hire date to the employee's actual LEI that had been earned while in the previous agency (last WGI, last promotion).

#### **Note:**

If the action you are entering is an intervening action, you must be in correction mode to insert remarks or change tracking data.

# **Step 1 Process Personnel Action**

Administer Workforce > Administer Workforce (USF) > Use > Request Action

#### **□**Data Control

- 1. Select Employee.
- 2. **Insert** a row (+).
- 3. Enter the **Actual Effective Date**. **PAR Status** defaults to *REO*.
- 4. Select Action Data Change.
- 5. Select Reason Code.
- 6. Enter the **NOA Code-** 966.

### **PAR Remarks**

- 1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the < or > arrows to view remarks.
- 2. **Remarks** <u>MUST</u> be entered indicating the changes made to the record.

#### Tracking Data

- 1. **Action Taken date** defaults to system date. The **Action Taken date** appears in Block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
  - a) Check the **Action Dt Ovrd** box.
  - b) Change Action Taken date.

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- c) Uncheck the **Action Dt Ovrd** box.
- 2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in Block 50 of the SF-50. To change (if necessary):
  - a) Check the **Override Operator Emplid** box.
  - b) Enter the required approving official in the **Emplid of Tracking Row** field. <u>DO NOT</u> uncheck **Override Operator Emplid** box.

**Review each page and make necessary change/changes.** If changing/correcting an SCD, refer to "Using SCD Calculator" under "Basic Operations/Functions."

#### Return to Data Control

- 1. Save.
- 2. Print SF-52 and review for accuracy.
- 3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
- 4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

## Administer Workforce > Administer Workforce (USF) > Use > Request Action

- 1. Click on Correct History.
- 2. Select Employee.
- 3. Make necessary corrections, delete row (-) or change PAR Status to PRO.
- 4. Save

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# 5.24 SF-113 Ceiling Flag

Federal agencies are required to report staffing and salary data to the Office of Personnel Management (OPM) each month. Currently, the SF-113A (Monthly Report of Federal Civilian Employment - staffing data) is being generated from CHRIS with some data adjustments made outside of CHRIS before the report is sent to OPM. The SF-113G (Monthly Report of Full-time Equivalent/Work-Year Civilian Employment --salary data) is being reported from PAYS.

CHRIS users have probably noticed the SF113G Ceiling check box on the Position Data page in the HR Processing menu. The check box currently turns on automatically as new actions are processed. However, there are some situations when the check box needs to be turned off (e.g., hires and other actions processed for employees under the Student Career Experience Program). CHRIS has been programmed to turn off the ceiling flag when actions are processed and the following conditions apply:

- 1. Participants in the Student Educational Employment Program, identified by current appointment authority codes YBM, YGM, Y3M, Y1M, Y2M, Y1K, Y2K, Y3K, Y4K and Y5K. (These were formerly Summer Aids and participants in The Stay-in-School Program, The Federal Junior Fellowship Program, and the Cooperative Education Program [Co-op] Program). The flag will be turned off based solely on the Current Appointment Authority from the Employment 1 page, Appt Data subpage; however, users should always update the Special Employment Pgm, as appropriate, when processing actions. These authorities relate to Special Employment Programs 54 and 62.
- 2. Persons appointed under the Worker Trainee Temporary Appointment Pending Establishment of a Register (TAPER) authorization under appointment MBM (e.g., Welfare to Work, Special Employment Program 10). The ceiling flag will be turned off if Current Appointment Authority equals MBM.
- 3. Persons appointed in the Worker-Trainee Program who are in developmental jobs (for 12-month period from date of appointment) who were appointed under the Veterans Readjustment Appointment (VRA). This will be based on a new Special Employment Program -- 58 VRA/Worker-Trainee.
- 4. Persons appointed to a special ceiling exempt position as indicated by Special Employment Program ID--11 Special Exemption to Ceiling.
- 5. Persons appointed to a summer position, Special Employment Program ID--56 Sum Prog Reg 316.402(a).
- 6. Employees on leave without pay, furlough, or suspension whose absence actually exceeds or is scheduled to exceed 30 calendar days. The ceiling flag will also be turned on automatically when these employees return to duty.
- 7. Employees serving in Pay Plans ED, EF and ZZ (Without Compensation).

When the above conditions no longer apply, the ceiling flag will be turned on automatically when a personnel action is processed which moves an employee out of an exempt category. However, in some cases, a NOA Code 966 Change/Correct Non-SF-50 will need to be processed to turn on the ceiling flag. These include:

Employees who are in developmental jobs who complete more than one year under a Worker-Trainee Program (See conditions 2 and 3 above). A new public tickler query "Tick\_Worker-Trainee Appts" has been provided to remind users to process NOA Code 966 to turn on the ceiling flag in these cases. This query should be run each pay period using the first day of the next pay period for the As of Date. The report will include all employees who will complete a year under the Worker-Trainee Program up to the As of Date if the ceiling flag is off.

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In rare situations, CHRIS users will need to turn off the SF-113G ceiling flag because CHRIS will not contain sufficient logic to make the determination automatically. To do this, the user will process a NOA Code 966 Change/Correct Non-SF-50 data and turn off the SF-113G Ceiling flag on the Position Data page in HR Processing for the following situations:

- 1. The employee is on leave with pay pending separation by disability retirement and meets both of the following criteria:
  - a) The employee's application for disability retirement has been approved by the Office of Personnel Management; and
  - b) The employee's use of sick leave after the approval date actually exceeds, or is scheduled to exceed, 30 calendar days.
- 2. The employee is on leave with pay pending separation by optional retirement and meets all five of the following criteria:
  - a) The employee has to retire because of ill health; and
  - b) The employee is on sick leave and the employing agency has received a licensed physician's certificate covering the entire period for which the employee has requested sick leave; and
  - c) The employee meets age and service requirements for optional retirement; and
  - d) A Standard Form (SF) 2801, "Application for Immediate Retirement" package has been submitted for retirement to become effective when the employee's sick leave expires; and
  - e) The employee's use of sick leave after the approval date exceeds, or is scheduled to exceed, 30 calendar days.
- 3. The employee received an on-the-job injury or illness and meets the following criteria:
  - a) Approval for worker's compensation has been received from the Department of Labor; and
  - b) Use of sick leave after the approval date exceeds, or is scheduled to exceed, 30 calendar days.

Process a NOA Code 966 (in preceding section) Change/Correct Non-SF-50 data and turn off the SF-113G Ceiling flag on the Position Data page in HR Processing.

# 5.25 Denial of Within Grade Increase

# **Step 1 Process Personnel Action**

Administer Workforce > Administer Workforce (USF) > Use > Request Action

### □Data Control

- 1. Select Employee.
- 2. **Insert** a row (+).
- 3. Enter the Actual Effective Date. PAR Status defaults to REQ.
- 4. Select **Action**.
- 5. Select **Reason Code**.
- 6. Enter the **NOA Code**.
- 7. Enter Authority#1 and/or Authority #2; if the authority requires inserts, enter them within the space provided to the right of the Authority Code field or as part of the actual Authority Code text.

#### PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the < or > arrows to view remarks.

### Tracking Data

- 1. **Action Taken date** defaults to system date. The **Action Taken date** appears in Block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
  - a) Check the **Action Dt Ovrd** box.
  - b) Change Action Taken date.
  - c) Uncheck the **Action Dt Ovrd** box.
- 2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in Block 50 of the SF-50. To change (if necessary):
  - a) Check the **Override Operator Emplid** box.
  - b) Enter the required approving official in the **Emplid of Tracking Row** field. <u>DO NOT</u> uncheck **Override Operator Emplid** box.

# **Employment 1**

1. WGI Status will automatically default to Denied.

- 1. Save.
- 2. Print SF-52 and review for accuracy.
- 3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
- 4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

# Administer Workforce > Administer Workforce (USF) > Use > Request Action

- 1. Click on Correct History.
- 2. Select Employee.
- 3. Make necessary corrections, delete row (-) or change PAR Status to PRO.
- Save.

## 5.26 Termination of Grade Retention

#### **Step 1 Process Personnel Action**

Administer Workforce > Administer Workforce (USF) > Use > Request Action

#### □Data Control

- 1. Select Employee.
- 2. **Insert** a row (+).
- 3. Enter the **Actual Effective Date**. This will be the day after the Grade Retention expires. **PAR Status** defaults *REQ*.
- 4. Select **Action**.
- 5. Select Reason Code.
- 6. Enter the **NOA Code**.
- 7. Enter Authority#1 and/or Authority #2; if the authority requires inserts, enter them within the space provided to the right of the Authority Code field or as part of the actual Authority Code text.

#### PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the < and > arrows to view remarks.

#### Tracking Data

- 1. **Action Taken date** defaults to system date. The **Action Taken date** appears in Block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
  - a) Check the **Action Dt Ovrd** box.
  - b) Change Action Taken date.
  - c) Uncheck the **Action Dt Ovrd** box.
- 2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in Block 50 of the SF-50. To change (if necessary):
  - a) Check the **Override Operator Emplid** box.
  - b) Enter the required approving official in the **Emplid of Tracking Row** field. <u>DO NOT</u> uncheck **Override Operator Emplid** box.

#### **□**Compensation

- 1. Review/Change Pay Rate Determinant Based on selection of the Pay Rate Determinant the Retained Grade Expires fields will clear.
- 2. Enter **Step** if employee is on a pay table with steps.
- 3. If employee is entitled to pay retention, select the appropriate **Pay Rate Determinant** and enter the base pay.

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#### **Employment 2**

1. The **Retained Grade Begin** and **End Date** fields will clear when the action is saved.

#### ☐ Return to Data Control

- 1. Save.
- 2. Print SF-52 and review for accuracy.
- 3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
- 4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

#### Administer Workforce > Administer Workforce (USF) > Use > Request Action

- 1. Click on Correct History.
- 2. Select Employee.
- 3. Make necessary corrections, delete row (-) or change PAR Status to PRO.
- 4 Save

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## **6** Pay Change Actions

#### **Contents**

- ⇒ CHRIS Action/Reason Code and Nature of Action Crosswalk
- **⇒** Earnings Code
- **⇒** Change to Lower Grade
- **⇒** Locality Pay
- **⇒** Bonus
- **⇒** Pay Adjustment
- **⇒** Promotion
- **⇒** Extension Of Promotion NTE
- **⇒** Award
- **⇒** Quality Increase
- **⇒ Within Grade Increase**

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# 6.1 CHRIS Action/Reason Code and Nature of Action Crosswalk – Pay Change Actions

Action Code	Action Description	Action/Reason Code	Nature of Action/Codes
ADL	Concurrent Appointment	CAR - Career Appointment CCA - Career-Conditional Appointment	100 - Career Appt 101 - Career-Cond Appt 107 - Emergency Appt 120 - O/S Ltd Appt 130 - Transfer 132 - Mass Transfer 140 - Reins-Career 141 - Reins-Career 141 - Rexe Appt 171 - Exc Appt 171 - Exc Appt NTE 198 - Interim Appt in Nonduty Status 199 - Interim Appt
ASC	Intl Assignment Completion	ASC – Intl Assignment Completion	500 - Conv to Career Appt
ASG	Intl Assignment	FEX – Foreign Expatriate Assignment FIN – Foreign Inpatriate Assignment FLA – Foreign Loan Assignment NAT – Third Country National	520 - Conv to O/S Ltd Appt
AWD	Award - Monetary	ENB – NNSA EN Empl Perf Bonus GNG – Group Gainsharing Award GNS – Gainsharing Award ING - Group Invention Award (Patent) INV – Individual Invention Award (Patent) NBG – Superior Accomplishments/Personal Effort Group Cash Award - NBO-WAPA Only NBO - Superior Accomplishment/Personal Effort Individual Cash Award - NBO-WAPA Only NBS - Superior Accomplishment/Personal Effort Individual Cash Award - NBS-WAPA Only NSG - Superior Accomplishment/Personal Effort Group Cash Award - NBS-WAPA Only OTG - On-The-Spot Group Award OTS - On-The-Spot Individual Award PAW - SES Performance Award PCA - Performance Rating Cash Award RNK - SES Rank Award SCA - Superior Accomplishment/Personal Effort Individual Cash Award SCG - Superior Accomplishment/Personal Effort Group Cash Award SGG - Group Suggestion Award SLR - Student Loan Repayment SUG - Individual Suggestion Award TGS - Group Time-Off Suggestion Award TOP - Time-Off Performance Award TOS - Individual Time-Off Suggestion Award TSA - Time-Off Superior Accomplishment/Personal Effort Individual Cash Award	817 - Student Loan Repayment 840 - Individual Cash Award 841 - Group Cash Award 842 - Individual Suggestion/Invention Award 843 - Group Suggestion/Invention Award 845 - Travel Savings Incentive 846 - Individual Time-Off Award 847 - Group Time-Off Award 878 - SES Rank Award 879 - SES Performance Award

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BON	Bonus	REC – Recruitment Bonus	815 - Recruitment Bonus
		REL – Relocation Bonus	816 - Relocation Bonus
		SEP – Separation Incentive	825 - Separation Incentive
		RFB – Referral Bonus	848 – Referral Bonus
DEM	Change to Lower Grade	CAO – Change to Lower Grade - CAO	713 - Change to Lower grade
		CMP – Competitive Selection EMP - At Employee's Request	740 - Position Change
		FPP – Failed Probationary Period	741 - Position Change NTE
		ING - RIF - No Grade Retention	
		MIS – Misconduct	
		MSP – MSPB Decision	
		NCS - Issuance of New Class Standards	
		OMB – Resulting from OMB Circular A-76	
		ORG – Reorganization	
		OTH – Other	
		PLF – Placement in lieu of RIF	
		PSC – Position Change	
		RCL – Resulting from Reclassification	
		RFF - Resulting from RIF RGR - RIF - Grade Retention	
		RPL – Resulting from RPL, CTAP, ICTAP	
		RTN – Change to Lower Grade	
		TTP – Termination of Temporary Promotion	
		USP – Unsatisfactory Performance	
		VRA – VRA Appointment	
DTA	Data Change	B&R - Change Fund Type/B&R Code	750 - Continuance NTE
	-	CAC - Change - Agency Code	755 - Exception to RIF Release
		CAI - Change – Annuitant Indicator	780 - Name Change From
		CBU - Change – Bargaining Unit	781 - Change in Work Schedule
		CCP - Change/Correct Position Number	782 - Change in Hours
		CDE - Change in Data Element	792 - Change in Duty Station
		CDP – Correction - Department	800 - Change in Data Element
		CFC - Change – FLSA Category CJC – Correction - Job Code	803 - Change in Retirement Plan
		COC - Change – Occup Code	805 - Elected Full Living Benefits
		CON – Change in Organization Name	806 - Elected Partial Living Benefits
		CPI - Change – Personnel Office ID	880 - Change in Tenure Group
		CPO - Change – Position Occupied	881 - FEGLI Change
		CPR - Change – Pay Rate Determinate	882 - Change in SCD
		CSA – Change in Sub-Agency	883 - Change in Vet Preference for RIF
		CSO – Change in Sub-Agency & Org Name	888 - Denial of WGI 904 – Change Fund Type/B&R Code
		CSV – Change in Supervisor	927 – Change in Sub-Agency
		CTL – Change in Title	928 - Change in Sub-Agency & Org Name
		DTY - Change in Duty Station DWI - Denial of Within Grade Increase	929 - Change in Organization Name
		EMP - At Employees Request	933 - Change in Title
		EXC - Exception to RIF Release	940 – Standby Premium Pay
		FEG - FEGLI Change	941 – Non-Foreign COLA
		FLB - Elected Full Living Benefits	942 – Post Allowance
		FTI – From FT to Intermittent	943 – Foreign Post Differential
		FUL - From Part-Time to Full-Time	944 – Home Leave Authorization
		HRS - Change in Hours	945 – Physician's Comparability
		IFT – From Intermittent to FT	946 - Danger Pay
		IPT – From Intermittent to PT	966 - Change/Correct Non-SF-50 Element
		NMC - Name Change	
		NSF – Change/Correct Non-SF-50 Element NTE - Continuance NTE	
		OTH – Other	
		PAR - From Full-Time to Part-Time	
		PLB - Elected Partial Living Benefits	
		PTI – From PT to Intermittent	
		RET - Change in Retirement Plan	
		SCD - Change in SCD	
		STC - Status Change	
		TEN - Change in Tenure Group	
		VET - Change in Veterans Preference	

EXT	Extension of NTE Date	CON - Conversion to Appt NTE	515 - Conversion to Appt NTE
		EAN - Extension of Appt NTE	571 - Conv to Excepted Appt NTE
		EEA - Conversion to Exc Appt NTE	760 - Extension of Appt NTE
		EFN - Extension of Furlough NTE	762 - Extension of SES Limited Appt NTE
		ELP - Extension of LWOP NTE	765 – Ext of Term Appt NTE
		EPC - Extension of Position Change NTE	769 - Extension of Prom NTE
		EPN - Extension of Promotion NTE	770 - Extension of Position Change NTE
		ESE - Extension of SES Limited Appt NTE	772 - Extension of Furlough NTE
		ETA - Ext of Term Appt NTE	773 - Extension of LWOP NTE
		EXT - Extension of NTE Date	,,,,
		SLG - Assignment to State/Local Gov.	
HIR	Hire	ADM – Administrative Accession	100 - Career Appt
IIIX	Tille	BRO - Brought into Competitive Service	101 - Career-Cond Appt
		CMP - Competitive Appointment	107 - Career-Cond Appt 107 - Emergency Appt
		DEM - Change to Lower Grade	107 - Emergency Appt 108 - Term Appt NTE
		ECA - Expert/Consultant Appointment	112 - Term Appt PER
		EMG - Emergency Appointment	115 - Appt NTE
			120 - O/S Ltd Appt
		EXC - Excepted Service Appointment	
		EXO - Executive Order Appointment	122 - O/S Ltd Appt NTE
		FNA - Foreign National Appointment	124 - Appt – Status Quo
		IPA - Intergovernmental Personnel Act	130 – Transfer
		LAT – Lateral	132 - Mass Transfer
		MIL – Military	140 - Reins-Career
		NPS - New Position	141 - Reins-Career-Cond
		OVS - Overseas Limited Appointment	142 - SES Career Appt
		PRO – Promotion	143 - Reins-SES Cond
		RES - Reinstatement Appointment	145 - Transfer SES Career
		RRR - Restoration/Reemployment Right	146 – SES Noncareer Appt
		SCH - Schedule A, B, C, Appointment	147 – Transfer SES Noncareer
		SES - Senior Executive Service Appt	148 - SES Ltd Term Appt NTE
		STQ - Appointment Status Quo	149 - SES Ltd Emergency Appt NTE
		TMP - Temporary Appointment	170 - Exc Appt
		TRN – Trainee	171 - Exc Appt NTE
		VOL - Volunteer Appointment	190 - Provisional Appt NTE
		VRA - VRA Appointment	198 - Interim Appt in Nonduty Status
		XFR - Transfer from Agency	199 - Interim Appt
		ZCL – Change to Lower Grade – CAO	500 – Conv to Career Appt
		ZCV – Conversion to – Appt - CAO	501 – Conv to Career – Cond Appt
		ZPC – Position Change – CAO	507 – Conv to Emergency Appt
		ZPR – Promotion – CAO	508 – Conv to Temp Appt NTE
		ZRS – Reassignment – CAO	512 – Conv to Temp Appt-PER
			515 – Conv to Appt NTE
			540 – Conv to Reins-Career
			541 – Conv to Reins-Career-Cond
			542 – Conv to SES Career Appt
			543 – Conv to SES Career 543 – Conv to Reins-SES Career
			546 – Conv to SES Noncareer Appt
			548 – Conv to SES Noncareer Appt 548 – Conv to SES Ltd Term Appt
			549 – Conv to SES Ltd Emergency
			570 – Conv to Exc Appt
			571 – Conv to Exc Appt NTE
			590 – Conv to Provisional Appt
			702 – Promotion
			703 – Promotion NTE
			713 – Change to Lower Grade
			721 – Reassignment
			740 – Position Change
			741 – Position Change NTE
			997 – Administration Accession
LOA	Leave Without Pay	EDU – Education	430 - Placement in NonPay Status
	,	FML - Family and Medical Leave Act	460 - LWOP NTE
		HEA - Health Reasons	473 - LWOP - US
		MAT - Maternity/Paternity	480 - Sabbatical NTE
		MIL - Military Service	

		OTH – Other PTD - Partial/Total Disability REL - Relocation	
		SAB - Sabbatical NTE SEA - Seasonal SLG - Assignment to State/Local Gov. USH - Unpaid Statutory Holiday	
LOF	Furlough	FUR - Furlough/Furlough NTE RED - Staff Reduction SEA - Seasonal Closure	471 – Furlough 472 - Furlough NTE
LTO	Long Term Disability	LTO - Long Term Disability	460 - LWOP NTE
PAY	Pay Rate Change	ADJ - Adjustment ALD - Change in Allowance/Differential AUO - Begin AUO AUT - Terminate AUO AVP - Availability Pay COL - Cost-of-Living GMW - GM WGI	810 - Change in Allowance/Differential 818 - AUO 819 - Availability Pay 850 - MD/DDS Special Pay 855 - Head Nurse Pay 866 - Termination of Grade Retention 867 - Interim WGI
		MER - Merit OTH - Other QSI - Quality Increase SPG - Step Progression TGR - Termination of Grade Retention WGI - Within Grade Increase	868 - Termination of Interim WGI 891 - GM WGI 892 - Quality Inc 893 – WGI 894 - Pay Adj 895 - Locality Payment 899 - Step Adjustment
PLA	Paid Leave of Absence	PDR – Pending Disability Retirement PTD – Partial/Total Disability SEA – Seasonal	480 – Sabbatical NTE
POS	Position Change	CAO - Position Change – CAO COC - Change in Occupational Code CON – Change in Org Name CSA – Change in Sub-Agency CSO – Change Sub-Agency & Org Name CSV – Change in supervisor EMP - Employee Request FPP – Failed Probationary Period ILR – In Lieu of RIF INA - Position Inactivated JRC – Job Re-Classification NCS - Issuance of New Class Standard NEW - New Position OTH - Other PRO – Promotion REA – Realignment RED – Reorganization REL – Realignment - CAO RIF – Resulting from RIF RSG – Reassignment STA - Position Status Change TTL – Title Change UPD – Position Data Update XFR – Transfer	500 - Conversion to Career Appt 721 - Reassignment 740- Position Change 790 - Realignment 933 - Change in Title
PRO	Promotion	CAO – Promotion - CAO CMP - Competitive Promotion CNT - Conversion to Appointment NTE CNV - Conversion – CAO CPT - Conversion to Appointment ECM - Exception to Competition ECR - Exception to Competition in Lieu of RIF EXC - Promotion Excepted Service FAI – Failure to Receive Proper Consideration NCP - Normal Career Progression NTE - Promotion NTE OTH - Other	500 - Conv to Career Appt 501 - Conv to Career-Cond Appt 507 - Conv to Emergency Appt 508 - Conv to Term Appt NTE 512 - Conv to Term Appt - PER 515 - Conv to Appt NTE 520 - Conv to O/S Ltd Appt 522 - Conv to O/S Ltd Appt NTE 524 - Conv to Appt - Status Quo 540 - Conv to Reins-Career 541 - Conv to Reins-Career 541 - Conv to SES Career Appt

		RFR – Reclassification	543 - Conv to Reins-SES Career
		RPR - Re-Promotion (Exception to Comp)	546 - Conv to SES Noncareer Appt
		RTL - Removal of Time Limitation	548 - Conv to SES Ltd Term Appt
		UPG – Upgrade	549 - Conv to SES Ltd Emergency
			570 - Conv to Exe Appt
			571 - Conv to Exe Appt NTE
			590 - Conv to Provisional Appt NTE
			702 - Promotion
			703 - Promotion NTE
REC	Return from Suspension/Furlough	RTD - Return to Duty	292 - Return to Duty
REH	Rehire	CMP - Competitive Appointment	100 - Career Appt
		ECA - Expert/Consultant Appointment	101 - Career-Cond Appt
		EMG - Emergency Appointment	107 - Emergency Appt
		EXC - Excepted Service Appointment	108 - Term Appt NTE
		EXO - Executive Level Appointment	112 - Term Appt - PER
		FNA - Foreign National Appointment	115 - Appt NTE
		IPA – Intergovernmental Personnel Act	120 - O/S Ltd Appt
		MIL - Military	122 - O/S Ltd Appt NTE
		OVS - Overseas Limited Appointment	124 - Appt – Status Quo
		RES - Reinstatement/Reemployment	130 - Transfer
		RRR - Restoration/Reemployment Right	132 - Mass Transfer
		SCH - Schedule A, B, C Appointment	140 - Reins-Career
		SES – Senior Executive Service Appt	141 - Reins-Career-Cond
		STQ - Appointment Status Quo	142 - SES Career Appt
		TMP - Temporary Appointment	143 - Reins-SES Cond
		TRN - Trainee	145 - Transfer SES Career
		VOL - Volunteer Appointment	146 - SES Noncareer Appt
		VRA - VRA Appointment	147 - Transfer SES Noncareer
		XFR – Transfer from Agency	148 - SES Ltd Term Appt NTE
			149 - SES Ltd Emergency Appt NTE
			170 - Exc Appt
			171 - Exc Appt NTE
			190 - Provisional Appt NTE
			198 - Interim Appt in Nonduty Status
			199 - Interim Appt
			500 – Conv to Career Appt
			501 – Conv to Career – Cond Appt
			507 – Conv to Emergency Appt
			508 – Conv to Temp Appt NTE
			512 – Conv to Temp Appt-PER
			515 – Conv to Appt NTE
			540 – Conv to Reins-Career
			541 - Conv to Reins-Career-Cond
			542 - Conv to SES Career Appt
			543 – Conv to Reins-SES Career
			546 - Conv to SES Noncareer Appt
			548 – Conv to SES Ltd Term Appt
			549 – Conv to SES Ltd Emergency
			570 – Conv to Exc Appt
			571 – Conv to Exc Appt NTE
			590 – Conv to Provisional Appt
			702 – Promotion
			703 – Promotion NTE
			713 – Change to Lower Grade
			721 – Reassignment
			740 – Position Change
			740 Position Change NTE
			997 – Administrative Accession
RET	Retirement	DIS – Disability	300 - Retirement - Mandatory
1111	10th ement	ERT - Early Retirement (Special Option)	301 - Retirement - Disability
		ILI – Retired - ILIA Adverse Action	302 - Retirement - Voluntary
		MAN - Mandatory	303 - Retirement - Special Option
		RET - Retired	304 - Retirement – ILIA

		RVL - Retired - Voluntary	
RFL	Return from LWOP	RFL - Return from LWOP	280 - Placement in Pay Status
			292 - Return to Duty
			293 - Return to Pay Status
STO	Short Term Disability	STD - Short Term Disability	460 - LWOP NTE
SUS	Suspension	DAC - Disciplinary Action	450 - Suspension NTE
		DSB - Disorderly Behavior	452 - Suspension – Indefinite
		ILA – Illegal Action	
		IND - Suspension – Indefinite	
		NTE - Suspension NTE	
TER	Termination	ADM – Administration Separation	312 - Resignation – ILIA
		ATT – Attendance	317 - Resignation
		CHI – Child/House Care	330 - Removal
		CON – Misconduct	350 - Death
		DEA – Death	351 – Termination - Sponsor Relocating
		DIS – Dishonesty	352 – Termination Appt in
		DPP – During Probationary/Trial Period	353 – Separation - US
		DSC – Discharge	355 – Termination - Exp of Appt
		EES – Dissatisfied w/Fellow Employee	356 – Separation - RIF
		EFT – End of Fixed-Term Contract	357 – Termination
		ELI – Elimination of Position	385 – Term during prob/trial period
		EXP – Expiration of Appointment	390 – Separation - Appt in
		FAM – Family Reasons	500 – Conv to Career Appt
		HEA – Health Reasons HRS – Dissatisfied with Hours	501 – Conv to Career-Cond Appt 507 – Conv to Emergency Appt
		ILL – Illness in Family	508 – Conv to Emergency Appt 508 – Conv to Term Appt NTE
		INS – Insubordination	512 – Conv to Term Appt NTE
		JOB – Job Abandonment	515 – Conv to Appt NTE
		LOC – Dissatisfied with Location	540 – Conv to Reins-Career
		LOW – Lack of Work/Funds	540 – Conv to Reins-Career-Cond
		LVE – Failure to Return from Leave	542 – Conv to SES Career Appt
		MAR – Marriage	543 – Conv to Reins-SES Career
		MIS – Misstatement on Application	546 – Conv to SES Noncareer Appt
		MSP – Directed by MSPB	548 – Conv to SES Ltd Term Appt
		MUT – Mutual Consent	549 – Conv to SES Ltd Emergency
		OTH – Other	570 – Conv to Exc Appt
		OTP – Resignation - Other Position	571 – Conv to Exc Appt NTE
		PAY – Dissatisfied with Pay	590 – Conv to Provisional Appt NTE
		PER – Personal Reasons	702 – Promotion
		POL – Dissatisfied w/Comp. Policies	703 – Promotion NTE
		PRM – Dissatisfied w/Promotion Opps	713 – Change to Lower Grade
		PTD – Partial/Total Disability	721 – Reassignment
		RAT - Retired from Affiliate	740 – Position Change
		RED – Staff Reduction	741 – Position Change NTE
		REF – Refused Transfer	903 – Administration Separation
		REL – Relocation	
		RES – Resignation	
		RET – Return to School	
		RIL – Resignation – ILIA	
		RLS – Release	
		RMV – Removal	
		SEC – National Security	
		SUP – Dissatisfied with Supervision	
		TAR – Tardiness	
		TRA – Transportation Problems	
		TYP – Dissatisfied with Type of Work	
		UNS – Unsatisfactory Performance	
		VIO – Violation of Rules	
		VSP – Voluntary Separation Program	
		WOR – Dissatisfied with Work Conditions	
		XFR – Transfer – Appt In	
		ZCL - Change to Lower Grade – CAO	
		ZCV – Conv to Appt – CAO	
		ZPC – Position Change – CAO	

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		ZPR – Promotion – CAO	
		ZRS – Reassignment – CAO	
XFR	Reassignment/Conversion	CAO - Conv to Appointment - CAO	500 - Conv to Career Appt
		CRM - Competitive Reassignment	501 - Conv to Career-Cond Appt
		CTA - Conv to Appointment	507 - Conv to Emergency Appt
		EER - Employee Request	508 - Conv to Term Appt NTE
		EXC - Exception to Competition	512 - Conv to Term Appt – PER
		FPP - Failed Managerial/Supervisory Period	515 - Conv to Appt NTE
		ILR – In Lieu of RIF	520 - Conv to O/S Ltd Appt
		MRR - Manager Request	522 - Conv to O/S Ltd Appt NTE
		MSP - MSPB Decision	524 - Conv to Appt-Status Quo
		NCS - Issuance of New Classification Standards	540 - Conv to Reins-Career
		OMB - Resulting from OMB Circular A-76	541 - Conv to Reins-Career-Cond
		PRO - Promotion	542 - Conv to SES Career Appt
		PSC - Position Change - CAO	543 - Conv to Reins-SES Career
		PSN - Position Change	546 - Conv to SES Noncareer Appt
		RCA - Reassignment - CAO	548 - Conv to SES Ltd Term Appt
		RCL - Resulting from Reclassification	549 - Conv to SES Ltd Emergency
		REA - Realignment	570 - Conv to Exc Appt
		RIF – RIF	571 - Conv to Exc Appt NTE
		RLC - Realignment - CAO	590 - Conv to Provisional Appt NTE
		ROR - Reorganization	721 – Reassignment
		ROT - Reassignment (Other)	740 - Position Change
		RPL - Resulting from RPL, CTAP, ICTAP	741 - Position Change NTE
		SES – Senior Executive Service Appt	790 – Realignment
		VRA - VRA Appointment	

## 6.2 Earnings Code

Earnings codes are used in CHRIS to establish, change, and terminate other pay, allowances, and differential.

- A separate action must always be processed to establish, change, or terminate each of these entitlements, allowances, and/or differentials. You must never use another personnel transaction such as hire, promotion, or reassignment to establish, change, and/or terminate these entitlements, allowances, and/or differentials. If one of these entitlements, allowances, and/or differentials begins, changes, or ends simultaneously with another personnel transaction, process two separate actions with the same effective date.
- In cases where an employee is eligible simultaneously to more than one entitlement, allowance, and/or
  differential all relevant earnings codes must be carried forward on each personnel action effective during
  that period.
- When a new entitlement, allowance, and/or differential is granted, you must click on the (+) within the Earnings Code box to insert a new earnings code row. **Do not delete or overwrite the existing earnings code row in these cases.**
- The only time you will actually remove an Earnings Code from any personnel transaction is when an action is being processed to terminate an entitlement.

The following NOA codes must be used to process these actions.

NOA Code	NOA	Purpose
810	Chg in Allow/Diff	Establish, change in percentage or terminate retention allowance or supervisory differential
818	AUO	Establish, change in percentage or terminate administratively uncontrollable overtime entitlement
819	Availability Pay	Establish or terminate availability pay
940	Standby Premium Pay	Establish, change in percentage or terminate standby premium
941	Non-Foreign COLA	Establish, change in percentage or terminate non-foreign COLA
942	Post Allowance	Establish, change rate, or terminate post allowance
943	Foreign Post Differential	Establish, change percentage, or terminate foreign post differential
944	Home Leave	Establish, change rate, or terminate home leave
945	Physician's Comparability	Establish, change rate, or terminate physicians comparability allowance
946	Danger Pay	Establish, change percentage, or terminate danger pay

Refer to Chapter 14 of this manual for a complete list of Earning Codes used in CHRIS.

3/2004 6.2-1

#### **Step 1 Process Personnel Action**

#### Administer Workforce > Administer Workforce (USF) > Use > Request Action

#### **□**Data Control

- 1. Select Employee.
- 2. **Insert** a row (+).
- 3. Enter the Actual Effective Date. PAR Status defaults to REQ.
- 4. Select Action.
- 5. Select Reason Code.
- 6. Enter the **NOA Code**.
- 7. Enter Authority#1 and/or Authority #2; if the authority requires inserts, enter them within the space provided to the right of the Authority Code field or as part of the actual Authority Code text.

#### PAR Remarks

- 1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the < or > arrows to view remarks.
- 2. For NOA Code 818, **Do not** use remark P81.

#### Tracking Data

- 1. **Action Taken date** defaults to system date. The **Action Taken date** appears in Block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
  - a) Check the **Action Dt Ovrd** box.
  - b) Change Action Taken date.
  - c) Uncheck the **Action Dt Ovrd** box.
- 2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in Block 50 of the SF-50. To change (if necessary):
  - a) Check the **Override Operator Emplid** box.
  - b) Enter the required approving official in the **Emplid of Tracking Row** field. DO NOT uncheck **Override Operator Emplid** box.

#### **Compensation**

#### Other Pay Information

- Review/Change/Enter Earnings Code if appropriate. Based on selection of Earnings Code, you may be required to enter the Pay Period Amount. If more than one earnings code is required, insert a row in the Earnings Code field.
- 2. If terminating, place cursor in the **Earnings Code** field and delete each row by using (-).
- 3. Verify salary information.

1/2004 6.2-2

## **6.3** Change to Lower Grade

#### **Step 1 Create or Modify Position.**

- A. If you are re-using an old Position, refer to the section on "Modifying Position" under "Position Information."
- B. If the Position does not exist, refer to the section on "Creating a Position" under "Position Information."

#### **Step 1 Process Personnel Action**

#### Administer Workforce > Administer Workforce (USF) > Use > Request Action

#### **□**Data Control

- 1. Select Employee.
- 2. **Insert** a row (+).
- 3. Enter the **Actual Effective Date**. **PAR Status** defaults to *REQ*.
- 4. Select Action.
- 5. Select Reason Code.
- 6. Enter the **NOA Code**.
- 7. Enter Authority#1 and/or Authority #2; if the authority requires inserts, enter them within the space provided to the right of the Authority Code field or as part of the actual Authority Code text.

#### PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the < or > arrows to view remarks.

#### Tracking Data

- 1. **Action Taken date** defaults to system date. The **Action Taken date** appears in Block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
  - a) Check the **Action Dt Ovrd** box.
  - b) Change Action Taken date.
  - c) Uncheck the **Action Dt Ovrd** box.
- 2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in Block 50 of the SF-50. To change (if necessary):
  - a) Check the **Override Operator Emplid** box.
  - b) Enter the required approving official in the **Emplid of Tracking Row** field. <u>DO NOT</u> uncheck **Override Operator Emplid** box.

#### □Job

- 1. Delete the **Position**.
- 2. Tab this will remove prior position information.
- 3. Enter the **Position** (**Job Code**, **Agency**, **Sub-Agency**, **Department**, and **Location** will default from Position Data).
- 4. Tab this will refresh with new position information.

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#### **Compensation**

- 1. Review/Change Pay Rate Determinant.
- 2. If employee is on retained grade or pay, enter applicable information.

#### Other Pay Information

 Review/Change/Enter Earnings Code if appropriate. Based on selection of Earnings Code, you may be required to enter the Pay Period Amount. If more than one earnings code is required, insert a row in the Earnings Code field.

#### Accounting Info

1. Review/Change Appropriation Code in the **Account** field.

#### **Employment 1**

- 1. Enter LEO SCD if applicable.
- 2. The **Pay Chg Dt** will autopopulate with the effective date of the action unless the Base Pay and Locality/LEO Adjustment does not equal the corresponding fields on the prior non-canceled row.
- 3. Review/Change **LEI Date**. Generally you would only manually change the LEI date when someone is changed to lower grade after serving a temporary promotion (to reflect the date of the last equivalent increase employee received while in their permanent position).

#### **Employment 2**

- 1. Review/Change/Enter Retained Grade Expires dates as appropriate. NOTE: Retained Grade Expiry Date should be entered one day less than the Retained Grade Begin Date. Ex: Retained Grade Begin Date is 12-12-1998, then Retained Grade Expiry Date should be 12-11-2000.
- 2. Review/Change **Permanent Data RIF**. <u>Note</u>: Should be the same as the position data record unless the employee is on a temporary promotion.

#### ☐ Return to Data Control

- 1. Save.
- 2. Print SF-52 and review for accuracy.
- 3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
- 4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

#### Administer Workforce > Administer Workforce (USF) > Use > Request Action

- 1. Click on Correct History.
- 2. Select Employee.
- 3. Make necessary corrections, delete row (-) or change PAR Status to PRO.
- 4. Save.

**NOTE:** Once old position becomes vacant, follow procedure under "Position Information" tab to inactivate it.

6/2004 6.3-2

## **6.4** Locality Pay

#### **Step 1 Process Personnel Action**

Administer Workforce > Administer Workforce (USF) > Use > Request Action

#### □Data Control

- 1. Select Employee.
- 2. **Insert** a row (+).
- 3. Enter the **Actual Effective Date**. **PAR Status** defaults to *REQ*.
- 4. Select Action.
- 5. Select Reason Code.
- 6. Enter the **NOA Code**.
- 7. Enter Authority#1 and/or Authority #2; if the authority requires inserts, enter them within the space provided to the right of the Authority Code field or as part of the actual Authority Code text.

#### **PAR Remarks**

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the < or > arrows to view remarks.

#### Tracking Data

- 1. **Action Taken date** defaults to system date. The **Action Taken date** appears in Block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
  - a) Check the **Action Dt Ovrd** box.
  - b) Change Action Taken date.
  - c) Uncheck the **Action Dt Ovrd** box.
- 2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in Block 50 of the SF-50. To change (if necessary):
  - a) Check the **Override Operator Emplid** box.
  - b) Enter the required approving official in the **Emplid of Tracking Row** field. <u>DO NOT</u> uncheck **Override Operator Emplid** box.

#### **Compensation**

- 1. Delete the **Step** and tab.
- 2. Re-enter the **Step** and tab.
- 3. Verify Locality Payment.
- 4. Enter base pay if employee's **Step** is "00."

## **Employment 1**

1. The **Pay Chg Dt** will autopopulate with the effective date of the action.

09/05/03 6.4-1

#### ☐ Return to Data Control

- 1. Save.
- 2. Print SF-52 and review for accuracy.
- 3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
- 4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

#### Administer Workforce > Administer Workforce (USF) > Use > Request Action

- 1. Click on Correct History
- 2. Select Employee.
- 3. Make necessary corrections, delete row (-) or change PAR Status to PRO.
- 4. Save.

09/05/03 6.4-2

## 6.5 Bonus - (Separation Incentive, Relocation, Recruitment and Referral Bonus)

#### **Step 1 Process Personnel Action**

Administer Workforce > Administer Workforce (USF) > Use > Request Action

#### **□**Data Control

- 1. Select Employee.
- 2. **Insert** a row (+).
- 3. Enter the **Actual Effective Date**. **PAR Status** defaults to *REQ*.
- 4. Select Action.
- 5. Select Reason Code.
- 6. Enter the **NOA Code**.
- 7. Enter Authority#1 and/or Authority #2; if the authority requires inserts, enter them within the space provided to the right of the Authority Code field or as part of the actual Authority Code text.

#### PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the < or > arrows to view remarks.

#### Tracking Data

- 1. **Action Taken date** defaults to system date. The **Action Taken date** appears in Block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
  - a) Check the **Action Dt Ovrd** box.
  - b) Change Action Taken date.
  - c) Uncheck the **Action Dt Ovrd** box.
- 2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in Block 50 of the SF-50. To change (if necessary):
  - a) Check the Override Operator Emplid box.
  - b) Enter the required approving official in the **Emplid of Tracking Row** field. <u>DO NOT</u> uncheck **Override Operator Emplid** box.

#### Award Data

- 1. Enter Award Amount.
- 2. <u>DO NOT</u> enter or change **Account Code**.

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#### ☐ Return to Data Control

- 1. Save.
- 2. Print SF-52 and review for accuracy.
- 3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
- 4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

#### Administer Workforce > Administer Workforce (USF) > Use > Request Action

- 1. Click on Correct History.
- 2. Select Employee.
- 3. Make necessary corrections, delete row (-) or change PAR Status to PRO.
- 4. Save.

09/05/03 6.5-2

## 6.6 Pay Adjustment

**NOTE:** If this Pay Adjustment requires a change to the employee's pay plan or grade, which is on rare occasion, the employee's position must reflect that change, i.e., from GM to GS pay plan. If not, proceed to Step 2.

#### **Step 1 Create or Modify Position.**

- A. If you are re-using an old Position, refer to the section on "Modifying Position" under "Position Information."
- B. If the Position does not exist, refer to the section on "Creating a Position" under "Position Information."

#### **Step 2 Process Personnel Action**

Administer Workforce > Administer Workforce (USF) > Use > Request Action

#### □Data Control

- 1. Select Employee.
- 2. **Insert** a row (+).
- 3. Enter the **Actual Effective Date**. **PAR Status** defaults to *REQ*.
- 4. Select Action.
- 5. Select Reason Code.
- 6. Enter the **NOA Code**.
- 7. Enter Authority#1 and/or Authority #2; if the authority requires inserts, enter them within the space provided to the right of the Authority Code field or as part of the actual Authority Code text.

#### PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the < or > arrows to view remarks.

#### Tracking Data

- 1. **Action Taken date** defaults to system date. The **Action Taken date** appears in Block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
  - a) Check the Action Dt Ovrd box.
  - b) Change Action Taken date.
  - c) Uncheck the **Action Dt Ovrd** box.
- 2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in Block 50 of the SF-50. To change (if necessary):
  - a) Check the **Override Operator Emplid** box.
  - b) Enter the required approving official in the **Emplid of Tracking Row** field. <u>DO NOT</u> uncheck **Override Operator Emplid** box.

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#### **□**Job

**Important:** If the pay adjustment requires a change to the pay plan or grade, which is on rare occasion, the following 2 steps **must be processed** so that the correct position information populates the Job:

- 1. Delete the **Position**.
- 2. Tab this will remove prior position information.
- 3. Enter the **Position** (**Job Code**, **Agency**, **Sub-Agency**, **Department**, and **Location** will default from Position Data).
- 4. Tab this will refresh with new position information.

#### Compensation - This applies to WB, WG, WL, and WS pay plans also.

- 1. If you made a change to the position information:
  - a) Enter the **Step**.
- 2. If the position information has not changed:
  - a) Delete the **Step** and tab.
  - b) Re-enter the **Step** and tab.

**<u>NOTE</u>**: If pay plan is WB or AD with a step then you must enter the step as "1", tab out of the step field and then re-enter the appropriate step.

- 3. Manually enter the base pay if the employee's **Step** is "00."
- 4. Verify salary information.

#### **Employment 1**

- 1. The **Pay Chg Dt** will autopopulate with the effective date of the action.
- 2. If processing this action for an employee with pay plan "AD," you may enter the **LEI Date** to track scheduled increases.

#### ☐ Return to Data Control

- 1. Save.
- 2. Print SF-52 and review for accuracy.
- 3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
- 4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

#### Administer Workforce > Administer Workforce (USF) > Use > Request Action

- 1. Click on Correct History.
- 2. Select Employee.
- 3. Make necessary corrections, delete row (-) or change PAR Status to PRO.
- 4. Save.

09/05/03 6.6-2

## **6.7 Promotion** - (Career Ladder, Competitive, Temporary Promotion NTE)

<u>Important</u>: Check to see if employee is entitled to a WGI before processing promotion if so, refer to the Section "Multiple Action With Same Effective Date for an Employee" under "Basic Operations/Functions."

#### **Step 1 Create or Modify Position.**

- A. If you are re-using an old Position, refer to the section on "Modifying Position" under "Position Information."
- B. If the Position does not exist, refer to the section on "Creating a Position" under "Position Information."

#### **Step 2 Process Personnel Action.**

Administer Workforce > Administer Workforce (USF) > Use > Request Action

#### □Data Control

- 1. Select Employee.
- 2. **Insert** a row (+).
- 3. Enter the **Actual Effective Date** and **Not to Exceed Date** if appropriate. **PAR Status** defaults to *REO*.
- 4. Select **Action**.
- 5. Select Reason Code.
- 6. Enter the **NOA Code**.
- 7. Enter **Authority#1 and/or Authority #2**; if the authority requires inserts, enter them within the space provided to the right of the **Authority Code** field or as part of the actual **Authority Code** text.

#### PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the < or > arrows to view remarks.

#### Tracking Data

- 1. **Action Taken date** defaults to system date. The **Action Taken date** appears in Block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
  - a) Check the **Action Dt Ovrd** box.
  - b) Change Action Taken date.
  - c) Uncheck the **Action Dt Ovrd** box.
- 2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in Block 50 of the SF-50. To change (if necessary):
  - a) Check the **Override Operator Emplid** box.
  - b) Enter the required approving official in the **Emplid of Tracking Row** field. <u>DO NOT</u> uncheck **Override Operator Emplid** box.

09/05/03 6.7-1

#### **□**Job

- 1. Delete the **Position**.
- 2. Tab this will remove prior position information.
- 3. Enter the Position (Job Code, Agency, Sub-Agency, Department, and Location will default from Position Data).
- 4. Tab this will refresh with new position information.

#### **Compensation**

- 1. Review/Change Pay Rate Determinant.
- 2. Enter Step, if applicable.
- 3. Verify Step Entry Date and Grade Entry Date.

**NOTE:** The **Grade Entry Date** field is system generated and reflects the effective date of the action that changes the employee's grade. (Example: If an employee has been a grade 12 for three years and then receives a temporary promotion to a 13, the temporary promotion action should reflect the date that he/she was promoted to the 13. Once a change to lower grade action is processed, the field should reflect the date that the employee was brought back to the grade 12, not the original date that he/she was promoted to the grade 12.)

#### Other Pay Information

1. Review/Change/Enter **Earnings Code** if appropriate. Based on selection of **Earnings Code**, you may be required to enter the **Pay Period Amount**. Insert a row in the **Earnings Code** field if more than one **Earnings Code** is required.

#### Accounting Info

1. Review/Change Appropriation Code in the **Account** field.

## **Employment 1**

<u>NOTE</u>: If the promotion being processed is to make a Temporary Promotion permanent you must manually enter the **Pay Chg Dt** and **LEI** using the effective date of the Temporary Promotion.

- 1. Enter LEO SCD if applicable.
- 2. The **Pay Chg Dt** will autopopulate with the effective date of the action unless the Base Pay and Locality/LEO Adjustment does not equal the corresponding fields on the prior non-canceled row.
- 3. The **LEI Date** will autopopulate with the effective date of the action.

#### Exp Dates

1. If processing a Temporary Promotion, enter **Temporary Promotion** date.

## **Employment 2**

- 1. Enter appropriate **Probation Dates: Probation Date, SES Probation, Supv/Manager Probation.**These dates should be completion dates of probation periods. Enter date completed if probationary period has already been served. Leave blank if not subject to a probationary period.
- 2. Enter **Retained Grade Expires** dates as appropriate.
- 3. **Permanent Data-RIF** autopopulates from the Position Data Record unless the employee is on a temporary promotion. Do not change if this is a temporary promotion.
- 4. Review other data and change as necessary. **Last Promotion Date** autopopulates with effective date of action. If a temporary promotion is made permanent, this date must be changed to reflect the effective date of the temporary promotion.

09/05/03 6.7-2

#### Security Info

- 1. Review/Change Security Clearance, Status, and Status Dt.
- 2. Indicate if a **Financial Disclosure** is required.

#### ☐ Return to Data Control

- 1. Save.
- 2. Print SF-52 and review for accuracy.
- 3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
- 4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

#### Administer Workforce > Administer Workforce (USF) > Use > Request Action

- 1. Click on Correct History.
- 2. Select Employee.
- 3. Make necessary corrections, delete row (-) or change PAR Status to PRO.
- 4 Save

**NOTE:** Once old position becomes vacant, follow procedure under "Position Information" tab to inactivate it.

09/05/03 6.7-3

## **6.8 Extension of Promotion NTE**

#### **Step 1 Process Personnel Action**

Administer Workforce > Administer Workforce (USF) > Use > Request Action

#### □Data Control

- 1. Select Employee.
- 2. **Insert** a row (+).
- 3. Enter the **Actual Effective Date**. **PAR Status** defaults to *REQ*.
- 4. Enter **Not to Exceed Date**.
- 5. Select Action.
- 6. Select Reason Code.
- 7. Enter the **NOA Code**.
- 8. Enter **Authority#1 and/or Authority #2**; if the authority requires inserts, enter them within the space provided to the right of the **Authority Code** field or as part of the actual **Authority Code** text.

#### PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the < or > arrows to view remarks.

#### Tracking Data

- 1. **Action Taken date** defaults to system date. The **Action Taken date** appears in Block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
  - a) Check the **Action Dt Ovrd** box.
  - b) Change Action Taken date.
  - c) Uncheck the **Action Dt Ovrd** box.
- 2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in Block 50 of the SF-50. To change (if necessary):
  - a) Check the **Override Operator Emplid** box.
  - b) Enter the required approving official in the **Emplid of Tracking Row** field. <u>DO NOT</u> uncheck **Override Operator Emplid** box.

#### **Compensation**

⇒ **NOTE:** The **Grade Entry Date** field is system generated and reflects the effective date of the action that changes the employee's grade. (Example: If an employee has been a grade 12 for three years and then receives a temporary promotion to a 13, the temporary promotion action should reflect the date that he/she was promoted to the 13. Once a change to lower grade action is processed, the field should reflect the date that the employee was brought back to the grade 12, not the original date that he/she was promoted to the grade 12.)

## **Employment 1**

#### Exp Dates

1. **Not to Exceed Date** will automatically update when action is saved.

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#### ☐ Return to Data Control

- 1. Save.
- 2. Print SF-52 and review for accuracy.
- 3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
- 4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

#### Administer Workforce > Administer Workforce (USF) > Use > Request Action

- 1. Click on Correct History.
- 2. Select Employee.
- 3. Make necessary corrections, delete row (-) or change PAR Status to PRO.
- 4. Save.

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## **6.9 AWard** - (Individual/Group Cash, Invention, Suggestion, Student Loan Repayment, Time Off, Travel Savings Incentive, etc.)

#### NOTE:

- If an award needs to be processed for an employee who has been reassigned (or promoted) to a different office than the one granting the award, the HR Office processing the award must coordinate the personnel action with the employee's current HR Office. Awards are charged to the employee's current organization; therefore, if the award was granted by the employee's former organization, the former organization must reimburse the current organization for the award amount paid to the employee. When mass award actions are processed by the CHRIS staff, both the current and former HR Office will be notified that coordination of the award payment will be needed.
- 2. In accordance with the DFAS pay system, two awards with the same NOAC and same effective date cannot be processed.

#### **Step 1 Process Personnel Action**

Administer Workforce > Administer Workforce (USF) > Use > Request Action

#### □Data Control

- 1. Select Employee.
- 2. **Insert** a row (+).
- 3. Enter the Actual Effective Date. PAR Status defaults to REQ.
- 4. Select Action.
- 5. Select **Reason Code**.
- 6. Enter Authority#1 and/or Authority #2 for NOA Code 878, SES Rank Award, or 879, SES Performance Award Only; if the authority requires inserts, enter them within the space provided to the right of the Authority Code field or as part of the actual Authority Code text.

#### PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the < or > to view remarks.

#### Tracking Data

- 1. **Action Taken date** defaults to system date. The **Action Taken date** appears in Block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
  - a) Check the **Action Dt Ovrd** box.
  - b) Change Action Taken date.
  - c) Uncheck the **Action Dt Ovrd** box.
- 2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in Block 50 of the SF-50. To change (if necessary):
  - a) Check the **Override Operator Emplid** box.
  - b) Enter the required approving official in the **Emplid of Tracking Row** field. <u>DO NOT</u> uncheck **Override Operator Emplid** box.

#### **Award Data**

1. Enter **Award Amount** or **Hours** as required.

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- 2. Enter appropriate identifier (case number) in **Group/Individual Award** field is available for optional use. This is <u>not</u> a required field. The value of "0000" identifies an individual award. The group award number should be greater than "0000" and is assigned by each office maintaining its own numbering system for group awards.
- 3. <u>DO NOT</u> enter or change the **Account Code**.

#### ☐ Return to Data Control

- 1. Save.
- 2. Print SF-52 and review for accuracy.
- 3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
- 4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

#### Administer Workforce > Administer Workforce (USF) > Use > Request Action

- 1. Click on Correct History.
- 2. Select Employee.
- 3. Make necessary corrections, delete row (-) or change PAR Status to PRO.
- 4 Save

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## **6.10** Quality Increase

#### **Step 1 Process Personnel Action**

Administer Workforce > Administer Workforce (USF) > Use > Request Action

#### □Data Control

- 1. Select Employee.
- 2. **Insert** a row (+).
- 3. Enter the **Actual Effective Date**. **PAR Status** defaults to *REQ*.
- 4. Select Action.
- 5. Select Reason Code.
- 6. Enter the **NOA Code**.
- 7. Enter Authority#1 and/or Authority #2; if the authority requires inserts, enter them within the space provided to the right of the Authority Code field or as part of the actual Authority Code text.

#### **PAR Remarks**

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the < or > arrows to view remarks.

#### Tracking Data

- 1. **Action Taken date** defaults to system date. The **Action Taken date** appears in Block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
  - a) Check the **Action Dt Ovrd** box.
  - b) Change Action Taken date.
  - c) Uncheck the **Action Dt Ovrd** box.
- 2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in Block 50 of the SF-50. To change (if necessary):
  - a) Check the Override Operator Emplid box.
  - b) Enter the required approving official in the **Emplid of Tracking Row** field. <u>DO NOT</u> uncheck **Override Operator Emplid** box.

## **□**Compensation

- 1. Enter the **Step** and the **Step Entry Date** will default to reflect the effective date of the action.
- 2. If Pay Plan is "GM" the base pay will automatically calculate the new salary. **DO NOT CHANGE BASE PAY FOR THE EMPLOYEES.**

## **Employment 1**

- 1. The **Pay Chg Dt** will autopopulate with the effective date of the action.
- 2. The LEI Date will be grayed out (not editable) since a QSI does not change the LEI Date.
- 3. The WGI Due Date will recalculate automatically if the QSI changes the WGI waiting period.

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#### ☐ Return to Data Control

- 1. Save.
- 2. Print SF-52 and review for accuracy.
- 3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
- 4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

#### Administer Workforce > Administer Workforce (USF) > Use > Request Action

- 1. Click on Correct History.
- 2. Select Employee.
- 3. Make necessary corrections, delete row (-) or change PAR Status to PRO.
- 4. Save.

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## **6.11 Within Grade Increase**

**Important**: Review **Non Pay Hours WGI** to determine if WGI should be delayed.

◆ The WGI Non-Pay Hours currently recorded in CHRIS include total non-pay hours during the WGI waiting period, not excess hours. The excess hours must be subtracted from the total hours in determining the correct effective date for the WGI. Non-pay Hours for a particular pay period are not posted in CHRIS until Friday following pay calculation for that pay period. Therefore, it is recommended that you process WGI's in the second week of the pay period following the effective date to ensure that effective dates are set correctly for employees who have non-pay hours during the waiting period. To view the WGI Non Pay Hours panel for verification of non pay hours:

#### Administer Workforce > Administer Workforce (USF) > Use > WGI Non Pay Hours

If an employee had any applicable NonPay hours prior to the implementation of CHRIS, the beginning row dated 9/26/1998 will show the cumulative carryover amount from the legacy system PAY/PERS.

It is recommended that after generating the WGI Tickler Report each pay period, to review these pages for any employee who has a balance of NonPay Hours. These pages will help determine the amount of hours used during the required waiting period and also determine whether or not the employee is entitled to the WGI. It is important to remember that the hours reflected on the WGI Tickler Report are the TOTAL AMOUNT of nonpay hours and **not excess** of allowable hours for the WGI waiting period.

◆ If the employee entitled to a WGI with a Pay Plan of GM and a Pay Rate Determinant of "M," it will be necessary to contact the CHRIS Functional Hotline for assistance in processing the WGI.

#### **Step 1 Process Personnel Action**

Administer Workforce > Administer Workforce (USF) > Use > Request Action

#### **□**Data Control

- 1. Select Employee.
- 2. **Insert** a row (+).
- 3. Enter the **Actual Effective Date**. **PAR Status** defaults to *REQ*.
- 4. Select Action.
- 5. Select Reason Code.
- 6. Enter the **NOA Code**.
- 7. Enter Authority#1 and/or Authority #2; if the authority requires inserts, enter them within the space provided to the right of the Authority Code field or as part of the actual Authority Code text.

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#### PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the < or > arrows to view remarks.

#### Tracking Data

- 1. **Action Taken date** defaults to system date. The **Action Taken date** appears in Block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
  - a) Check the **Action Dt Ovrd** box.
  - b) Change Action Taken date.
  - c) Uncheck the **Action Dt Ovrd** box.
- 2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in Block 50 of the SF-50. To change (if necessary):
  - a) Check the Override Operator Emplid box.
  - b) Enter the required approving official in the **Emplid of Tracking Row** field. <u>DO NOT</u> uncheck **Override Operator Emplid** box.

#### **Compensation**

- 1. Enter the **Step** and the **Step Entry Date** will default to reflect the effective date of the action. <u>NOTE</u>: For a GM-13/14/15 employee, use the 891 NOA Code, and the base pay will autocalculate--<u>DO NOT</u> enter the base pay manually. The new base pay will autopopulate with the maximum amount for the grade if the calculation would otherwise have exceeded the step 10 rate for the grade.
- 2. **Locality/LEO Adjustment** and **Total Pay** will then be calculated automatically based on the new base salary. There will be no change to the **Step Entry Date**.

#### Other Pay Information

- 1. Review/Change/Enter **Earnings Code** if appropriate.
- 2. Review/Change Pay Period Amount if appropriate.

#### **Employment 1**

- 1. The **Pay Chg Dt** will autopopulate with the effective date of the action.
- 2. The **LEI Date** will autopopulate with the effective date of the action.
- 3. The WGI Due Dt and WGI Status will autopopulate based on the LEI, Pay Plan, Pay Rate Determinant, and Tenure.
- 4. **WGI Override** will automatically change from "Manual" to "Auto" if employee's record previously was changed to "Manual."

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#### ☐ Return to Data Control

- 1. Save.
- 2. Print SF-52 and review for accuracy.
- 3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
- 4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

#### Administer Workforce > Administer Workforce (USF) > Use > Request Action

- 1. Click on Correct History.
- 2. Select Employee.
- 3. Make necessary corrections, delete row (-) or change PAR Status to PRO.
- Save

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## 7 Separation Actions

#### **Contents**

- ⇒ CHRIS Action/Reason Code and Nature of Action Crosswalk
- **⇒** Resignation
- **⇒** Retirement
- **⇒** Separation
- **⇒** Death
- **⇒** Processing Actions For Separated Employees

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# 7.1 CHRIS Action/Reason Code and Nature of Action Crosswalk – Separation Actions

Action Code	Action Description	Action/Reason Code	Nature of Action/Codes
RET	Retirement	DIS - Disability ERT - Early Retirement (Special Option) ILI - Retired - ILIA Adverse Action MAN - Mandatory RET - Retired	300 - Retirement - Mandatory 301 - Retirement - Disability 302 - Retirement - Voluntary 303 - Retirement - Special Option 304 - Retirement - ILIA
TER	Termination	RVL - Retired - Voluntary  ADM - Administration Separation  ATT - Attendance  CHI - Child/House Care  CON - Misconduct  DEA - Death  DIS - Dishonesty  DPP - During Probationary/Trial Period  DSC - Discharge  EES - Dissatisfied w/Fellow Employee  EFT - End of Fixed-Term Contract  ELI - Elimination of Position  EXP - Expiration of Appointment  FAM - Family Reasons  HEA - Health Reasons  HRS - Dissatisfied with Hours  ILL - Illness in Family  INS - Insubordination  JOB - Job Abandonment  LOC - Dissatisfied with Location  LOW - Lack of Work/Funds  LVE - Failure to Return from Leave  MAR - Marriage  MIS - Misstatement on Application  MSP - Directed by MSPB  MUT - Mutual Consent  OTH - Other  OTP - Resignation - Other Position  PAY - Dissatisfied w/th Pay  PER - Personal Reasons  POL - Dissatisfied w/Comp. Policies  PRM - Dissatisfied w/Promotion Opps  PTD - Partial/Total Disability  RAT - Retired from Affiliate  RED - Staff Reduction  REF - Refused Transfer  REL - Relocation  REF - Resignation - ILIA  RLS - Release  RMV - Removal  SEC - National Security  SUP - Dissatisfied with Supervision  TAR - Tardiness  TRA - Transportation Problems  TYP - Dissatisfied with Type of Work  UNS - Unsatisfactory Performance  VIO - Violation of Rules	312 - Resignation – ILIA 317 - Resignation 330 - Removal 350 - Death 351 - Termination - Sponsor Relocating 352 - Termination Appt in 353 - Separation - US 355 - Termination - Exp of Appt 356 - Separation - RIF 357 - Termination 385 - Term during prob/trial period 390 - Separation - Appt in 500 - Conv to Career Appt 501 - Conv to Career Appt 507 - Conv to Emergency Appt 508 - Conv to Term Appt NTE 512 - Conv to Term Appt NTE 512 - Conv to Reins-Career 541 - Conv to Reins-Career 541 - Conv to Reins-Career 541 - Conv to Reins-Career 542 - Conv to SES Career Appt 543 - Conv to SES Noncareer Appt 544 - Conv to SES Noncareer Appt 549 - Conv to SES Ltd Term Appt 549 - Conv to SES Ltd Term Appt 549 - Conv to Exc Appt 571 - Conv to Exc Appt 571 - Conv to Exc Appt 572 - Promotion 703 - Promotion NTE 713 - Change to Lower Grade 721 - Reassignment 740 - Position Change 741 - Position Change 741 - Position Change 741 - Position Separation

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Action Code	Action Description	Action/Reason Code	Nature of Action/Codes
		VSP – Voluntary Separation Program	
		WOR - Dissatisfied with Work Conditions	
		XFR – Transfer – Appt In	
		ZCL – Change to Lower Grade – CAO	
		ZCV – Conv to Appt – CAO	
		ZPC – Position Change – CAO	
		ZPR – Promotion – CAO	
		ZRS – Reassignment – CAO	

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## 7.2 Resignation

<u>NOTE</u>: If this Separation involves Voluntary Separation Pay, you must also process a Bonus for the amount. See "Processing a Bonus" under section entitled "Pay Change Action."

#### **Step 1 Process Personnel Action**

Administer Workforce > Administer Workforce (USF) > Use > Request Action

#### **□**Data Control

- 1. Select Employee.
- 2. **Insert** a row (+).
- 3. Enter the **Actual Effective Date**. **PAR Status** defaults to *REQ*.
- 4. Select Action.
- 5. Select **Reason Code**.
- 6. Enter the **NOA Code**.
- 7. Enter **Authority #1 and/or Authority #2**: if the authority requires inserts, enter them within the space provided to the right of the **Authority Code** field or as part of the actual **Authority Code** text.

#### **PAR Remarks**

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press - to delete unnecessary remarks. Use the < or > arrows to view remarks.

#### Tracking Data

- 1. **Action Taken date** defaults to system date. The **Action Taken date** appears in Block 49 of the SF-50. To change (if necessary):
  - a) Check the **Action Dt Ovrd** box.
  - b) Change Action Taken date.
  - c) Uncheck the **Action Dt Ovrd** box.
- 2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in Block 50 of the SF-50. To change (if necessary):
  - c) Check the **Override Operator Emplid** box.
  - d) Enter approving official in the **Emplid of Tracking Row** field. <u>DO NOT</u> uncheck **Override Operator Emplid** box.

#### **Personal Data**

1. To change **Personal Phone Numbers**, refer to section "Correcting Personal Phone Numbers" under "Basic Operations/Functions."

### □Employment 1

1. **Separation Dt** will default to reflect the effective date of the action.

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### ☐ Return to Data Control

- 1. Save.
- 2. Print SF-52 and review for accuracy.
- 3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
- 4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must reenter the page in **Correct History** using the following path:

## Administer Workforce > Administer Workforce (USF) > Use > Request Action

- 1. Click on Correct History.
- 2. Select Employee.
- 3. Make necessary corrections, delete row (-) or change **PAR Status** to **PRO**.
- 4. Save.

<u>NOTE</u>: Once an old position becomes vacant, follow the procedure under "Position Information" tab to inactivate it.

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# 7.3 Retirement

<u>NOTE</u>: If Retirement entitles employee to Separation Incentive Pay, you must <u>first</u> process the Bonus action. See "Processing a Bonus," under section entitled "Pay Change Actions."

## **Step 1 Process Personnel Action**

Administer Workforce > Administer Workforce (USF) > Use > Request Action

### □Data Control

- 1. Select Employee.
- 2. **Insert** a row (+).
- 3. Enter the **Actual Effective Date**. **PAR Status** defaults to *REQ*.
- 4. Select Action.
- 5. Select Reason Code.
- 6. Enter the **NOA Code**.
- 7. Enter **Authority #1 and/or Authority #2**: if the authority requires inserts, enter them within the space provided to the right of the **Authority Code** field or as part of the actual **Authority Code** text.

#### **PAR Remarks**

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the < or > arrows to view remarks.

### Tracking Data

- 1. **Action Taken date** defaults to system date. The **Action Taken date** appears in Block 49 of the SF-50. To change (if necessary):
  - a) Check the Action Dt Ovrd box.
  - b) Change Action Taken date.
  - c) Uncheck the **Action Dt Ovrd** box.
- 2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in Block 50 of the SF-50. To change (if necessary):
  - e) Check the **Override Operator Emplid** box.
  - f) Enter approving official in the **Emplid of Tracking Row** field. <u>DO NOT</u> uncheck **Override Operator Emplid** box.

### Personal Data

1. To change **Personal Phone Numbers**, refer to section "Correcting Personal Phone Numbers" under "Basic Operations/Functions."

# **Employment 1**

1. **Separation Dt** will default to reflect the effective date of the action.

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### ☐ Return to Data Control

- 1. Save.
- 2. Print SF-52 and review for accuracy.
- 3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
- 4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

## Administer Workforce > Administer Workforce (USF) > Use > Request Action

- 1. Click on Correct History.
- 2. Select Employee.
- 3. Make necessary corrections, delete row (-) or change PAR Status to PRO.
- 4. Save.

<u>NOTE</u>: Once an old position becomes vacant, follow the procedure under "Position Information" tab to inactivate it.

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# 7.4 Separation - (RIF, Removal, Termination)

## **Step 1 Process Personnel Action**

Administer Workforce > Administer Workforce (USF) > Use > Request Action

### □Data Control

- 1. Select Employee.
- 2. **Insert** a row (+).
- 3. Enter the Actual Effective Date. PAR Status defaults to REQ.
- 4. Select Action.
- 5. Select Reason Code.
- 6. Enter the **NOA Code**.
- 7. Enter Authority#1 and/or Authority #2; if the authority requires inserts, enter them within the space provided to the right of the Authority Code field or as part of the actual Authority Code text.

### PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the < or > arrows to view remarks.

### Tracking Data

- 1. **Action Taken date** defaults to system date. The **Action Taken date** appears in Block 49 of the SF-50. To change (if necessary):
  - a) Check the **Action Dt Ovrd** box.
  - b) Change Action Taken date.
  - c) Uncheck the **Action Dt Ovrd** box.
- 2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in Block 50 of the SF-50. To change (if necessary):
  - a) Check the Override Operator Emplid box.
  - b) Enter approving official in the **Emplid of Tracking Row** field. <u>DO NOT</u> uncheck **Override Operator Emplid** box.

### **Severance Pay**

- 1. If applicable, change **Severance Status** to active.
- 2. Enter the Severance Pay and Severance Weekly Amounts.

### Personal Data

1. To change **Personal Phone Numbers**, refer to section "Correcting Personal Phone Numbers" under "Basic Operations/Functions."

### □ Job

 If this action is a Termination Appt-In, you must enter the appropriate 2-digit agency code in the To Agency field.

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# **Employment 1**

1. Review **Separation Dt**; it will reflect the effective date of the action.

### ☐ Return to Data Control

- 1. Save.
- 2. Print SF-52 and review for accuracy.
- 3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
- 4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

### Administer Workforce > Administer Workforce (USF) > Use > Request Action

- 1. Click on Correct History.
- 2. Select Employee.
- 3. Make necessary corrections, delete row (-) or change PAR Status to PRO.
- 4. Save.

**NOTE:** Once old position becomes vacant, follow procedure under "Position Information" tab to inactivate it.

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# 7.5 Death

## **Step 1 Process Personnel Action**

Administer Workforce > Administer Workforce (USF) > Use > Request Action

### □Data Control

- 1. Select Employee.
- 2. **Insert** a row (+).
- 3. Enter the Actual Effective Date. PAR Status defaults to REQ.
- 4. Select **Action**.
- 5. Select Reason Code.
- 6. Enter the **NOA Code**.

#### PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the < or > arrows to view remarks.

### Tracking Data

**Action Taken date** defaults to system date. The **Action Taken date** appears in Block 49 of the SF-50. To change (if necessary):

- a) Check the **Action Dt Ovrd** box.
- b) Change Action Taken date.
- c) Uncheck the Action Dt Ovrd box.
- 1. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in Block 50 of the SF-50. To change (if necessary):
  - a) Check the **Override Operator Emplid** box.
  - b) Enter approving official in the **Emplid of Tracking Row** field. <u>DO NOT</u> uncheck **Override Operator Emplid** box.

# **Employment 1**

1. **Separation Dt** will default to reflect the effective date of the action.

### **Return to Data Control**

- 1. Save.
- 2. Print SF-52 and review for accuracy.
- 3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
- 4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

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# Administer Workforce > Administer Workforce (USF) > Use > Request Action

- 1. Click on Correct History.
- Select Employee.
   Make necessary corrections, delete row (-) or change PAR Status to PRO.
- 4. Save.

**NOTE:** Once old position becomes vacant, follow procedure under "Position Information" tab to inactivate it.

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# 7.6 Processing Actions For Separated Employees

<u>NOTE</u>: Administrative Accessions should only be used to establish a record in CHRIS for a separated employee who has not previously held a record in CHRIS.

Occasionally it is necessary to process an action or correct erroneous data for a separated employee. Examples are:

- A separated employee receives an award.
- An employee who separates to accept a position with an international organization elects to retain Federal benefits such as retirement, FEGLI, and FEHB during the international assignment. Pay actions such as within-grade increases and pay adjustments for which the IAEA employee becomes eligible must be processed to allow for correct billing of benefits.
- A separated employee has erroneous data such as a retirement code that was wrong in the legacy system and now needs to be corrected for payroll and retirement record purposes.

If the employee holds a record in CHRIS, follow standard processing procedures to process the action(s) or correction(s). In this case, do **not** process an Administrative Accession or Administrative Separation.

The following procedures will be used when it is necessary to access an employee into the CHRIS system, process one or more actions, and return the employee to "Terminated" status.

- Gather data needed for the Administrative Accession. This information will come from a variety of sources such as the SF-7, OPF, payroll records, information from other Federal agencies, etc.
- Select the effective date for the action. Examples are:
  - You must process an Administrative Accession (NOA Code 997), a Within-Grade Increase (NOA Code 893), and an Administrative Separation (NOA Code 903) all effective 03/01/98. It is essential that these steps be followed exactly because of the impact on the payroll interface. The actions must be entered sequentially and all three actions must be entered on the same day.
  - You must process an Administrative Accession (NOA Code 997) to correct erroneous data such as the retirement code and then process an Administrative Separation (NOA Code 903) to change the employee to "Terminated" status. If the employee separated between 03/01/98 and 09/26/98, and for some reason the employee does not have a record in CHRIS, use the date of separation as the effective date for both actions. Otherwise, you will use 03/01/98 as the effective date for both actions as this is a key date for the PAYS interface. If you use a date prior to 03/01/98, the information will not be picked up on the PAYS interface. Note: Most employees who separated on or after 12/01/97 will already be in the CHRIS database.
  - Request new job codes, if needed.
  - Determine if the Department ID (organization code) from which the employee was separated is in CHRIS. If not, it will be necessary to select a related organization code that is valid in CHRIS as of the effective date of your Administration Accession.

#### STEP 1

### Administer Workforce > Administer Workforce (USF) > Use > Request Action

- 1. Select separated employee.
- 2. **Insert** a Row (+).
- 3. Enter the **Actual Effective Date**. **PAR Status** defaults to *REQ*.
- 4. Select **Action** *Hire*.
- 5. Select Reason Code Administrative Accession.

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- 6. Enter the **NOA Code** 997 *Administrative Accession*.
- 7. Save.

### STEP 2 - (For Pay and Award Actions Only)

- 1. **Insert** a Row (+).
- 2. Follow the directions for the WGI, Pay Adjustment or Award.
- 3. Use the *same effective date* as the Hire action.
- 4. Save.

# STEP 3 - <u>Also used to transfer employees to BPA (Bonneville Power Admin) or FERC</u> (Federal Energy Regulatory Commission)

- 1. Select separated employee.
- 2. **Insert** a Row (+).
- 3. Enter the **Actual Effective Date** (same as the Hire action).
- 4. Select **Action** *Termination*.
- 5. Select **Reason Code** Administrative Separation.
- 6. Enter the **NOA Code** 903 *Administrative Separation*.
- 7. Save.

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# 8 Correction & Cancellation Actions

### **Contents**

- **⇔** Correction
- **⇒** Cancellation
- **⇒** Settlement Agreements and Court Orders

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# 8.1 Correction

### **NOTE:**

- 1. Use this procedure to correct official OPM actions as well as 9XX actions.
- 2. NOA Code 002 can NEVER be used to correct an action with an incorrect NOA Code. You must process a NOA Code 001, Cancellation, to cancel the action with the incorrect NOA code and then re-enter the action using the correct NOA Code. Corrections can only be processed on actions in "PRO" PAR Status. Corrections can only be processed on items previously entered in CHRIS. To correct historical actions (not processed in the CHRIS database) see Section 13, Web Applications.

If this correction involves changes in Position Data such as: **Grade, Title, Series, Location, Department, Work Schedule, Position Occupied, Standard Hours, Bargaining Unit, etc.,** you must refer to the section on "Modifying a Position" under "General Procedures."

- 3. NOA Code 002 can NEVER be used to correct an Effective Date. You must cancel the action with the incorrect Effective Date and re-enter the action with the correct Effective Date.
- 4. For more information on refreshes, see the section entitled "Action Refreshes."
- 5. Always enter remarks that fully explain what item(s) of the employee's record is being corrected. Check the *Guide to Processing Personnel Actions* for the appropriate types of remarks. Remarks enable Payroll to correctly identify what needs to be changed and how to proceed with the 002 or 966 action.

Review the following before processing Corrections:

• The following data elements can be corrected from the most recent *permanent* action on which the error appears: Date Of Birth; Name; Position Number; Veterans Preference; Veterans Preference for RIF; Service Computation Date [Leave]; Bargaining Unit Status; Position Occupied Code; Fund type/BR code; FLSA Category; and Tenure. **Note:** It is important to remember that when you are correcting one of these data elements that you make sure that you correct the most recent **permanent** action AND any non-permanent actions above it. The permanent action is the one that must be filed on the right side of the OPF and for that reason, it must be corrected. Remember to include remarks which state that this correction corrects actions from (date) to (date). Otherwise, there will be no record of the correction in the OPF. Non-permanent actions above the most recent permanent action must be corrected also so that future actions pick up the change in the data element. All other data elements that appear on the SF-50 must be corrected by processing a NOAC 002-Correction for every SF-50 on which the error appears. Like all other NOAC 002's, it is imperative to enter a remark in order to explain what is being corrected.

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- Process NOAC 002-Correction to 9XX actions when incorrect data appear on these actions. NOAC 9XX actions will no longer be refreshed by the CHRIS Functional Hotline unless the refresh is completed the same day the action is entered or changed to a PAR Status of COR or PRO and before the action has been transmitted to Defense Civilian Payroll System (DCPS).
- If it is necessary to process an intervening action, the actions that have already been processed with an effective date greater than the effective date of the intervening action will have incorrect data. If the new intervening action impacts data that appears on the SF-50 of these later actions, all of these later actions must be corrected. NOAC 002-Correction actions should be completed the same day as the intervening action to ensure that all of these actions are transmitted to the Defense Civilian Payroll System (DCPS) on the same day.
- Never process a NOAC-002-Correction to an award or bonus action to correct any salary field. This includes Basic Pay, Locality/LEO Adjustment, Adjusted Basic Pay, Total Pay and Other Pay such as Retention Allowance, Availability Pay, AUO, etc. NOAC 002-Correction actions must be processed to correct all other fields that appear on the SF-50 for awards and bonuses.
- If a NOAC 002-Correction action is processed, changes can also be made to data fields that do not appear on the SF-50. For example, if you process an intervening NOAC 893 Within-Grade Increase (WGI) and you need to process a NOAC-002 Correction to actions already in CHRIS with an effective date later than the intervening action, you should also change the LEI Date on all of these Correction actions. If changes to non-SF-50 data elements are made, use Remark Z05 to explain the changed data, in addition to any standard OPM remarks, as required.
- When multiple NOAC 002-Correction actions are processed, it is essential that these correction actions are processed in chronological order with the oldest action being corrected first and the most recent action last. Review the employee's Official Personnel Folder, identify the actions that have incorrect data, identify any other data fields in CHRIS that are incorrect but do not appear on the SF-50, and then complete NOAC 002-Correction actions.
- In some cases, it will be necessary to refresh salary information on NOAC 002-Correction actions. For example, an employee had a promotion that was already in CHRIS when the retroactive NOAC 895-Locality Payment was processed and that Promotion already had a NOAC 002-Correction action to correct salary fields. When the second Correction action is processed, the new NOAC 002-Correction is inserted on top of the initial action and data fields are copied forward from that action. The second Correction will reflect the salary before the new locality percentages were implemented, unless salary information is refreshed even though the first NOAC 002-Correction has correct salary information.

# **Step 1 Process Personnel Action**

Administer Workforce > Administer Workforce (USF) > Use > Correction

### □Data Control

1. Select Employee.

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- 2. Scroll to the action you want to correct; verify the **Effective Date**. If there are other 002 Correction Actions for that action, insert the current Correction Action on top of the most recent of the existing 002 Correction Actions.
- 3. Insert a row (+).
- 4. **PAR Status** defaults to *COR*.

#### PAR Remarks

- 1. Press (+) to insert **Remarks** or (-) to delete **Remarks**.
- 2. Use the < or > arrows to view **Remarks**.
- 3. You must delete old remarks, and then enter appropriate remarks for the correction.
- 4. Be sure to include a remark stating what has been corrected.

### Tracking Data

- 1. Enter the current date in the **Action Taken date** block. The **Action Taken date** appears in Block 49 of the SF-50.
- 2. Enter the **Emplid** of the PAR approving official for your sub-agency in the **Emplid of Tracking Row** block. The **Emplid of Tracking Row** appears in Block 50 of the SF-50.

## □ Job- Any changes that affect position must be made in Manage Positions first.

- 1. If changes were made under Manage Positions:
  - a) Delete the **Position**.
  - b) Tab this will remove prior position information.
  - c) Enter the Position (Job Code, Agency, Sub-Agency, Department, and Location will default from Position Data.)
  - d) Tab this will refresh with new position information.

# **Compensation**

- 1. Review/Change Pay Rate Determinant if applicable.
- 2. Enter **Step** if this Correction affects position data.

# **Employment 1**

1. Change necessary data fields. See information on "Using SCD Calculator" under "Basic Operations/Functions."

# **□**Employment 2

1. Change necessary data fields.

### □ Return to Data Control

- 1. Save Read the message. You must review records affected by changes and check the Review Performed Flag before saving.
- If you are correcting an action that is *not* the most recent action, a message will direct you to review records affected by the changes and check the **Review Performed Flag** on the Data Control Page before you save the action.
- 3. Use the right-hand scroll bar to review subsequent actions. On each record you must check the Review check box in the upper right hand corner before saving. See section entitled "*Understanding Reviewed Flag*" under "*Basic Operations/Functions*" for an explanation of **Reviewed Flag**.
- 4. Scroll back to the Correction Action.
- 5. Save.

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# 8.2 Cancellation

- 1. Use this procedure to correct official OPM actions as well as 9XX actions.
- 2. A NOA Code 001 should <u>never</u> be processed to cancel a NOA Code 002. If a Correction Action should <u>NOT</u> have been processed because data on the original action were correct, issue a second 002 action to correct the "original" action. A NOAC 001 cannot be processed to cancel an action that was entered the same day as the cancellation.
- 3. Cancellation is used to rescind an earlier action that was improper, that was proper but contained references to an improper action, or that contains remarks that are inappropriate or erroneous and that should not have been recorded.

<u>NOTE</u>: This process should only be used for an official NOA Code 001 Cancellation PAR action.

If employee's record only has <u>one</u> action (single row) of data, you must <u>first</u> insert a row and enter the appropriate action, then process the cancellation for the incorrect/unnecessary action.

If the cancellation affects <u>Position Data</u> you will need to delete the appropriate rows of position information that were created/modified for the action being canceled.

# Review the following before processing Cancellations:

When a NOAC 001-Cancellation is processed as an intervening action, review **all actions** with an effective date greater than the effective date of the intervening Cancellation (or equal to the effective date if multiple actions are effective on that date and there are actions with a higher transaction sequence than the action being cancelled). Determine whether or not the Cancellation impacts other actions in CHRIS and process NOAC 002-Correction actions as appropriate to revert data back to what is was prior to the cancellation. Only **awards/bonuses** can be refreshed by the CHRIS Functional Hotline where affected data elements do not print on the SF-50 (e.g., salary data fields). These corrections and refreshes should be completed the same day as the Cancellation if at all possible.

# **Step 1 Process Personnel Action**

Administer Workforce > Administer Workforce (UDF) > Use > Cancellation

### □Data Control

- 1. Select Employee.
- 2. Select appropriate action and verify Effective Date.

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- 3. You can *NEVER* insert a row on a canceled row.
- 4. Click on **PAR Status** and change to **CAN**.
- 5. Enter Authority #1 and/or Authority #2 if applicable.
- 6. If you are canceling an action that is *not* the most recent action, a message will direct you to review records affected by the changes and check the **Review Performed Flag** on the Data Control Page before you save the action.
- 7. Save.

### PAR Remarks

- 1. Press (+) to insert **Remarks** or (-) to delete **Remarks**.
- 2. Use the < or > arrows to view **Remarks**.
- 3. You must delete old remarks, and then enter appropriate remarks for the cancellation.

### Tracking Data

- 1. Enter the current date in the **Action Taken date** block. The **Action Taken date** appears in Block 49 of the SF-50.
- 2. Enter the Emplid of the PAR approving official for your sub-agency in the **Emplid of Tracking Row** block. The **Emplid of Tracking Row** appears in Block 50 of the SF-50.

**NOTE**: If this is not the most recent action being canceled, you will need to cancel/correct each subsequent action.

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# 8.3 Settlement Agreements And Court Orders

CHRIS users are urged to review these procedures carefully. Since many of these situations require the processing of multiple retroactive personnel actions, this processing activity must be planned carefully in close coordination with CHRIS, Payroll, and DOEInfo staff members. The CHRIS user assigned responsibility for effecting the settlement agreement and/or court order must work closely with the CHRIS Functional Hotline staff to prepare and correct the employment history, the Payroll Office to reconstruct the retirement card, and the DOEInfo staff to purge any actions that will be obsolete. Users are urged to initiate an early conference call initially with CHRIS Functional Hotline to discuss the terms of the agreement or court order that must be implemented. Subsequent discussions will probably be necessary with Payroll and DOEInfo staff members prior to the time that the new actions are affected in CHRIS.

#### **Background**

Certain settlement agreements, decisions, and court orders require the correction or cancellation of previously issued actions and processing of replacement actions and/or newly-required actions to make the employee "whole." According to the Guide for Processing Personnel Actions, agencies are required to change the employee's record in their service record system, making sure to delete all actions or items referring to a canceled action. DOEInfo is the corporate repository system which maintains the service record history information, SF-7.

In addition to the Official Personnel File (OPF) reflecting the reconstructed record and the service record containing no references to any canceled actions, the settlement agreement or decision may stipulate that all references to negative, adverse, or erroneous information be removed from all automated or electronic files. For DOE, the electronic records are maintained within the Corporate Human Resource Information System (CHRIS) which is used to process personnel actions and update DOEInfo.

#### Procedure

This procedure addresses how the service record system will be reconstructed and the manner in which electronic records will be expunged if the decision states that this is required.

- 1. Upon notification by the HR Office that an employee's personnel record must be reconstructed and the electronic records must be purged due to a settlement agreement or court order, the CHRIS user will identify what actions need to be canceled, corrected, and replaced or are newly required.
- 2. The CHRIS user will print the SF-7 card and annotate the document with the types of actions that need to be removed, inserted, or corrected.
- 3. The CHRIS user will fax the annotated SF-7 record to the CHRIS Functional Hotline at (304) 285-0902 for evaluation as to how the actions should be processed in CHRIS.
- 4. The CHRIS Functional Hotline staff will review the document to determine:
  - how far back the employee's history must be reconstructed.
  - if all the actions can be done within CHRIS.
  - what actions the user can process within the system.
  - what actions the CHRIS staff will need to enter in the system.
  - if job codes and table modifications (e.g., department table) are needed to accommodate the historical actions.
  - what actions need to be deleted from the system after the record is reconstructed.
- 5. The CHRIS staff will contact the user to discuss the steps needed and advise of any intervention needed.

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- 6. All actions to effect a settlement agreement or court order should be processed in a single pay period, preferably in as compressed a time frame as possible. The user should notify the CHRIS Functional Hotline in advance of when he/she plans to affect these actions. Generally, processing (both position and employee changes) should begin immediately following a pay calculation run to give the user ample time within a single pay period to complete all actions. Any new job codes that may be needed may be requested prior to the pay period in which the processing will occur.
- 7. As needed, the user will contact the CHRIS Functional Hotline for assistance in processing the actions. The CHRIS staff will work jointly with the user on those actions or table updates that need to be done by the hotline staff
- 8. The user will check DOEInfo the next day to verify if the actions have been updated in the repository and will notify the Hotline when the actions are completed.
- 9. The CHRIS Hotline will delete the actions (rows) for all cancellation, correction, and original actions that contain references to the erroneous actions as specifically required by the settlement agreement. The actions will be deleted **only after** the transactions have been reported to OPM on the next CPDF Dynamic report. Upon completion, the Hotline staff will notify the user in writing that the actions in CHRIS were purged.
- 10. After processing the settlement agreement or court ordered actions, the user will obtain a copy of the most recent SF-7 record and annotate the document with those actions that need to be removed or added on retirement record card, SF-2806. If CHRIS could not be reconstructed to accurately reflect the employee's service history due to the age of the actions, the user will manually prepare any SF-50s.
- 11. The user will forward a note to CR-55, along with a copy of the annotated SF-7 card and the SF-50s, requesting reconstruction of the retirement record card. Send the request to:

Payroll Division, CR-55 Department of Energy 19901 Germantown Road Germantown, MD 20874

12. If the settlement agreement or court order stipulates that historical electronic records are required to be expunged of the erroneous actions, provide a copy of the annotated SF-7 card to:

Frank Casaleno Department of Energy, SO-4 19901 Germantown Road Germantown, MD 20874

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# 9 Action Refreshes

### **Contents**

- **⇒** Refreshes of Current Actions
- **⇒** Refreshes of Intervening Actions

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# 9.1 Refreshes of Current Actions

- Refreshes can be completed on any action and to any data element if the refresh is requested and completed on the <u>SAME DAY</u> the action was entered or changed to a PAR Status of COR or PRO in CHRIS and before the action has been transmitted to Defense Civilian Payroll System (DCPS).
- Refreshes can be done for Award/Bonus actions for any field that does not appear on the Award/Bonus SF-50, such as salary fields.
- Refreshes will <u>no longer</u> be completed to change Standby Premium. NOAC 940 will be used to change, establish, or terminate Standby Premium in the Defense Civilian Payroll System (DCPS) when the action is not effective in conjunction with a standard OPM action. If this action is processed as an intervening action, new NOAC 940 actions must be inserted on top of each action in CHRIS that has an effective date greater than the initial NOAC 940 action. The effective date for the NOAC 940 actions will be the same date as the effective date of the action being updated.

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# 9.2 Refreshes of Intervening Actions

- Refreshes can be completed on any action and to any data element if the refresh is completed on the **SAME DAY** the action is completed with a PAR Status of COR or PRO in CHRIS and before the action has passed Defense Civilian Payroll System (DCPS).
- Salary fields (including Other Pay such as Retention Allowance, Availability Pay, AUO, etc.) <u>MUST BE</u> refreshed on all award actions when an intervening action causes an award action with a later effective date to carry incorrect salary data. This data does not print on the SF-50 nor does it pass to the Defense Civilian Payroll System (DCPS) on this type of action. These refreshes should be completed the **same day** as the intervening action when possible.
- When an intervening action is processed to terminate or change an NTE date for a Temporary Appointment, you must insert a NOAC 966 action on top of each action in CHRIS that has an effective date greater than the intervening action to change the Hire NTE. Contact the CHRIS Functional Hotline IMMEDIATELY ON THE SAME DAY after you complete the NOAC 966 so that they can refresh the Hire NTE since you do not have access to this field.
- When an intervening action is processed to terminate or change an NTE date on a Temporary Promotion, you must insert a NOAC 966 action for each action already in CHRIS using the same effective dates of the actions to remove the Promotion Expiration Date on the Employment Data I/Exp Date page. If you are completing NOAC 002-Corrections to any of these actions, you may remove the expiration date on these Corrections instead of processing a new NOAC 966 action.
- When an intervening action is processed to terminate or change an NTE date for LWOP, you must contact the CHRIS Functional Hotline to request a refresh of Non Pay Data fields on Employment 2/Non Pay Data Page. This refresh should be completed the same day the intervening action is completed.
- When a NOAC 866-Termination of Grade Retention is completed as an intervening action, you must process a NOAC 966 action on top of each action in CHRIS with an effective date greater than the effective date of the NOAC 866 action to remove the Retained Grade Begin and Expires Dates on Employment Data 2 page. If you are completing NOAC 002-Corrections to any of these actions, you may remove these dates on these Corrections instead of processing a new NOAC 966 action.
- When an intervening action is processed that changes the Grade Entry or Step Entry date, the user <u>MUST</u> contact the CHRIS Functional Hotline so they can refresh these dates since these fields are grayed out and the user cannot access them.
- When **intervening** 9XX actions are processed to change any field that appears on the SF-50 (e.g., Subagency, Dept ID, POI), NOAC 002-Correction actions will need to be completed on all actions with an effective date greater than the effective date of the intervening action so that the SF-50/52 Print Data table and the Defense Civilian Payroll System (DCPS) data update correctly.
- Refreshes will <u>no longer</u> be completed to change Standby Premium. NOAC 940 will be used to change, establish, or terminate Standby Premium in the Defense Civilian Payroll System (DCPS) when the action is not effective in conjunction with a standard OPM action. If this action is processed as an intervening action, new NOAC 940 actions must be inserted on top of each action in CHRIS that has an effective date greater than the initial NOAC 940 action. The effective date for the NOAC 940 actions will be the same date as the effective date of the action being updated.

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# 10 CHRIS Reporting

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# **10.1 Corporate Reports**

# Reports Available From Manage Human Resources/DOE Reports

**PAR Remarks**This report will generate a listing of PAR Remarks sorted by Remark Code.

Accession by Bargaining Unit This report runs using specified "from/to" dates so that a biweekly report can

be generated based on the designated BUS Code and sub-agency.

Alpha List of Active Employees This report will create an alphabetical list of employees within your

subagency.

**Awards Report** This report runs using "from/to" dates based on the designated sub-agency for

"any" employee who has an award-related NOA processed such as 872, 874 through 879, 885, and 892. The user will have the capability to select the desired NOA Codes from a drop down list. It will also indicate the

employee's status.

Bargaining Unit Employees This report runs using an "as of" date to obtain a snapshot of employees based

on the designated BUS Code and sub-agency.

**Organization (Profile) Report** This report will create an organizational list of employees within your sub-

agency.

**Service Awards** This report will generate a list of employees eligible for a service award.

**SSN List of Active Employees** This report will create a list of active employees by Social Security Number.

**User Workload Report** This report will generate a count of actions processed by NOA Code and

Operator ID's with the subagency.

**REQ/INI Stat Report** This will generate a listing of actions that are in a PAR Status of REQ/INI.

Terminations by Bargaining Unit This report runs using specified "from/to" dates so that a biweekly report can

be generated based on the designated BUS Code and sub-agency.

**Department Managers Report** This report generates a list of the Department Table with the Manager

assigned to each department.

"Reports to" Report

This report generates a list of each employee within their sub-agency and the

their supervisor from the position data and employment data record.

"Reports to" Differences This report generates a list of differences that exist between the employees

position data record and the employment data record.

# Reports Available From Manage Positions/Reports

**Job Code Table Report** This report creates a job code listing for your organization(s).

**Official Position Titles Report** This report creates a list of all official position titles used in CHRIS.

**Organization Position Titles**This report creates a list of all organization position titles used in CHRIS.

**Vacant Position Report**This report creates a list of your vacant positions and information about those

positions.

# **Printing from Adobe Acrobat 5.0**

Forms, reports, and queries will no longer be sent directly to your printer. All print jobs will be sent to the report repository. The Report Manager is where a list of your print jobs wait for viewing or printing. Some reports will require you to modify the "Copies and Adjustments" section (e.g., to shrink oversized pages to paper size) on the Print page. This is to control what buttons need to be turned on or off. You may have to open "Properties" and select the proper orientation "Portrait" or "Landscape" (e.g., to "Flip on Long Edge" to print reverse of SF-50). Once the form, report, or query appears in the print preview display as you want to see it printed, send it to the printer.

# **How to Establish A Run Control**

A Run Control is a set of instructions that you enter to establish a new run control for the first generation of each available report that you use thereafter when you run the same report. You may establish an unlimited number of run controls, but once established, they cannot be deleted.

- 1. Add Used to setup/create a completely new Run Control ID. Enter a Run Control ID (max 30 characters) on the popup window and click OK. If the Run Control already exists, you will get the error message: "Specified record already exists Update?" Press 'Yes' to use the Entered Run Control ID or 'No' to add a new one. On the next screen you will be required to enter the requested information before you will be able to use the new Run Control. You may add additional sub agency information, where appropriate, by hitting the (+) key.
- 2. **Search** Used when executing an existing Run Control. Once a **Run Control ID** is setup the same **Run Control ID** can be used every time to run the same report.

# **Running Reports to Excel from CHRIS**

Use the following steps to run established queries to Excel from CHRIS:

Logon on to CHRIS using your site's special query logon ID and password.

Go to: Home > PeopleTools > Query Manager > Use > Query Manager

Type the first few letters of the query name (NO for Notices, TICK for Ticklers, N\_MASS to generate spreadsheets requesting mass actions) in the 'Search For' field and click on the Search button to generate a list of queries.

In the resulting query list, click on the 'Run' hyperlink at the end of the line for the query you want to run. This will take you to a 'Query – Microsoft Internet Explorer' window displaying the query results or presenting prompts associated with the query.

<u>Note</u>: If you click on the query name instead of the RUN link, you will open the query. Once the query is open, the Run hyperlink will appear at the bottom of the page. (You may have to scroll down to see it.)

If there are prompts associated with the query, the next screen will display the prompt fields and the headings for the query report. Fill in the prompt fields and click on the 'View Results' button to fill in the report.

<u>Note</u>: The calendar icon beside date prompts is nonfunctional. This will be corrected in a later version of the software.

If you want to run the query to a spreadsheet, click on the hyperlink for 'Download results in: an Excel Spreadsheet' at the top of the page to run the report to EXCEL.

If you see a File Download page, select "Open this file from its current location" and click on OK.

If you see an 'Open With' window, choose MicroSoft Excel as the program you want to use.

In the Query results screen, go to the File menu and choose Close to close that Internet Explorer window and return to the query window.

When you run reports to Excel you will notice that any fields from the database that begin with zero will pull into the spreadsheet without the zero(s). Some examples of these fields are National ID (SSN), Position Number, Dept ID and Job Code.

Follow these steps to re-format these fields:

To reformat National ID (SSN), click on the column label within the spreadsheet for National ID or Social Security number to select the entire column. Then select the Format/Cells menu option. On the Number tab, select the Custom option, pick 0 under Type, then type in 8 additional zeros in the TYPE field. Click OK. This will restore the NID/SSN to a 9-digit string by adding back any leading 0's.

You can use the same procedure with 8 zeros for Position number and 6 zeros for Jobcode. You can use 10 zeros for Deptid if all of your departments in the column should be 10 characters long.

Columns or adjacent cells that are empty may not display the grid lines. To turn on all grid lines:

- Click in the top left corner cell (the unlabeled intersecting cell above row 1 and before column A) to select the entire spreadsheet.
- Select the menu option Format \ Cells.
- On the Alignment tab, make sure 'Wrap Fields' is NOT checked (if it is checked, turn it off).
- On the Border tab, click on the icon labeled 'inside'. (Or click the 'borders' icon on the tool bar and pick the option showing a solid line cross within a solid line square.)

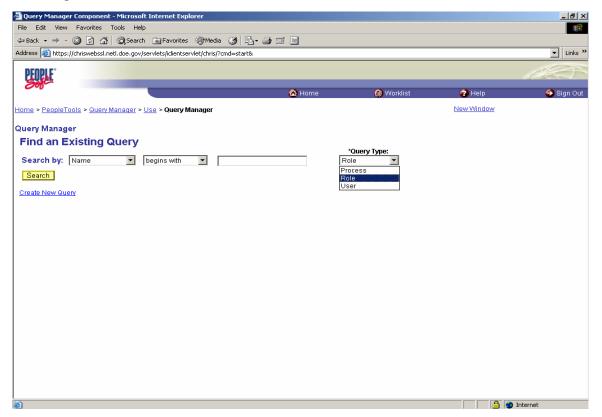
# **Query Tool Enhancements**

### **Query Tool Enhancements**

#### Records Tab:

The Search page for queries and records reflect the following enhancements:

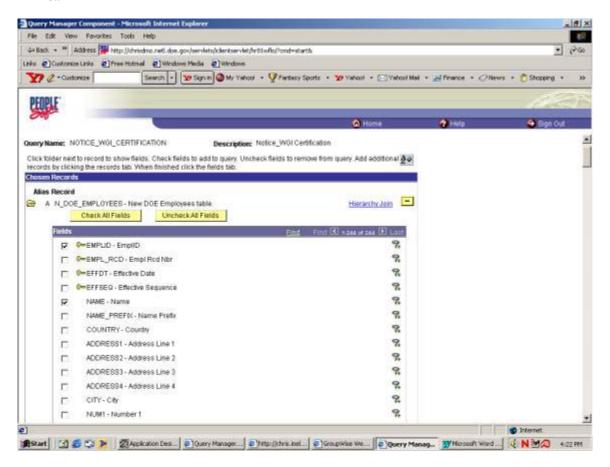
- a. The "Search In" (Name / Description / Both) radio button set has been replaced with a Drop Down List defaulted to 'Name.'
- b. The "Search Type" (Begins With \ Ends With \ Contains) radio button set has been replaced with a Drop Down List defaulted to 'Begins With.'
- c. A required "Query Type" Drop Down list has been added. This defaults to 'User' and *should NEVER be changed*.



#### **Queries Tab:**

The Queries tab has been enhanced with the following:

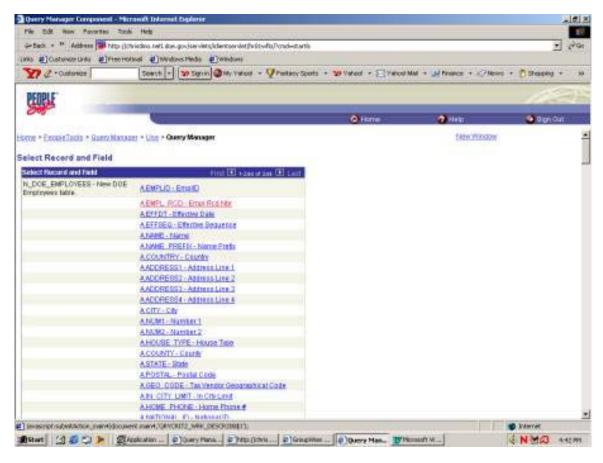
- a. The Queries tab displays all fields available from the record on which the query is based. The A/Z button has been added to allow the columns/fields to be sorted alphabetically.
- b. The "Check All Fields" and "Uncheck All Fields" buttons have been moved to the top of the query field list.



#### **Expression Tab:**

The Expression Tab has been enhanced with the following:

a. When adding a field to an expression, the list of fields to select includes the field name and description. The table name is also prefixed with a Table Description.

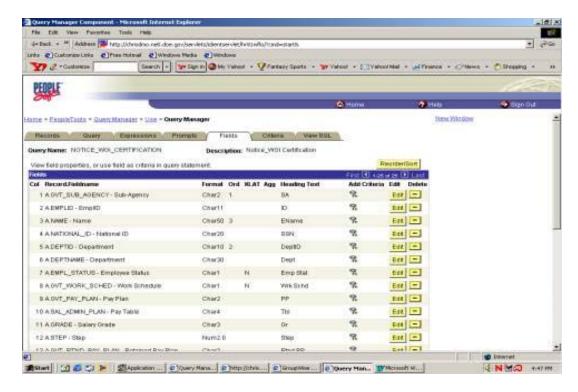


#### Fields Tab:

The Fields tab has been enhanced with the following:

- a. The Fields tab displays all the fields selected in the query. A ReOrder/Sort button has been added to allow the columns/fields to be manually re-ordered while displaying all columns/fields on the same page.
- b. Fields are listed with their corresponding descriptions.
- c. The layout for the Edit Field Properties page has been modified.

### CHRIS HR Users' Manual



#### Edit Field Properties Page:



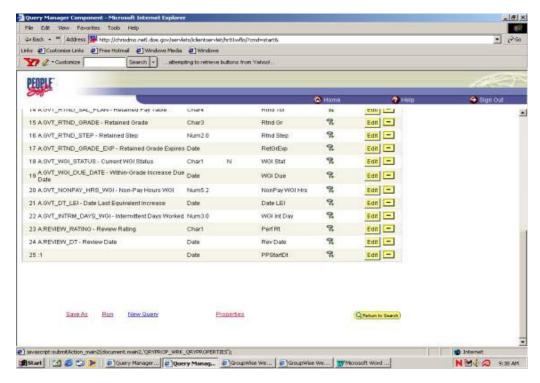
### CHRIS HR Users' Manual

### Edit Field Ordering:



#### Properties Link:

This page is accessed from a link that appears at the bottom of each page after the Save As, Save, and Run Links.



#### Searchstring Tab:

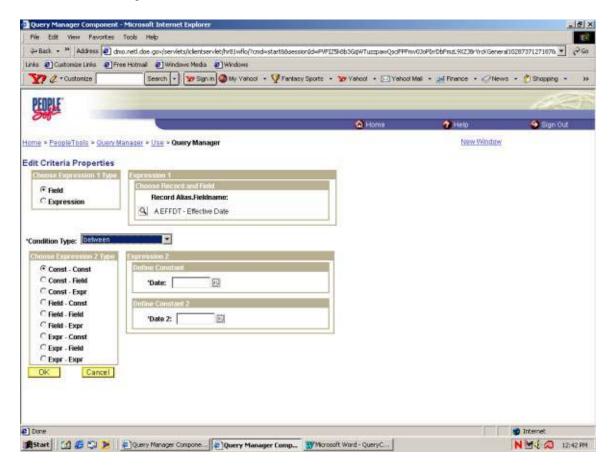
The following Condition Types have been added:

```
"between" / "not between"
"exists" / "not exists,"
"in list" / "not in List"
```

"between" Example:

#### EFFDT between 01/01/2002 and 01/31/2002.

- 1. Open the Notice WGI Certification
- 2. Click the searchstring Tab
- 3. Click the Add searchstring
- 4. Select a Record.Field Name: EFFDT
- 5. Select between from Condition Type Drop Down List
- 6. Enter Dates in appropriate Edit Boxes.
- 7. Click OK to complete.



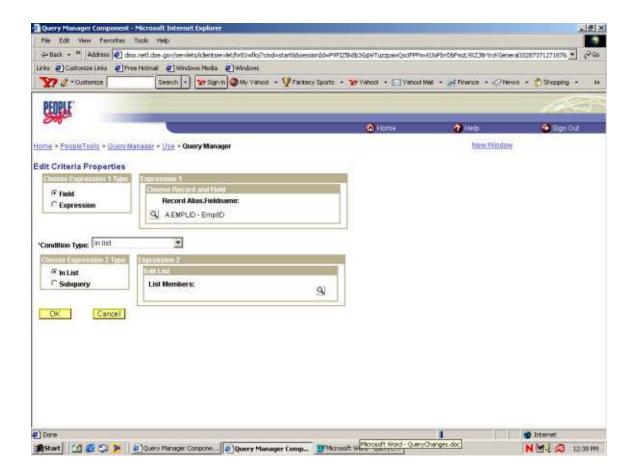
### CHRIS HR Users' Manual

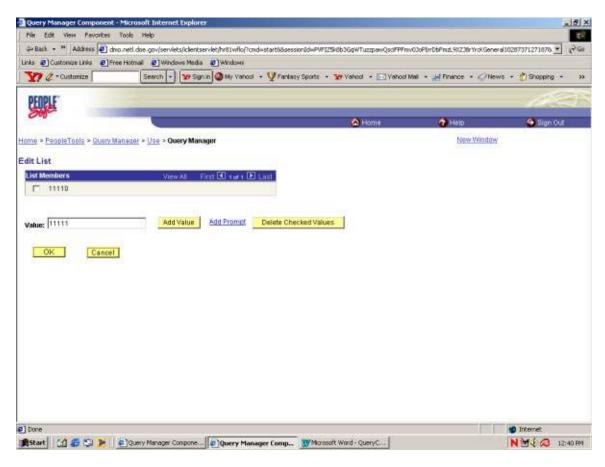
"in list" Example:

EMPLID in list ('10111', '11111', '21003').

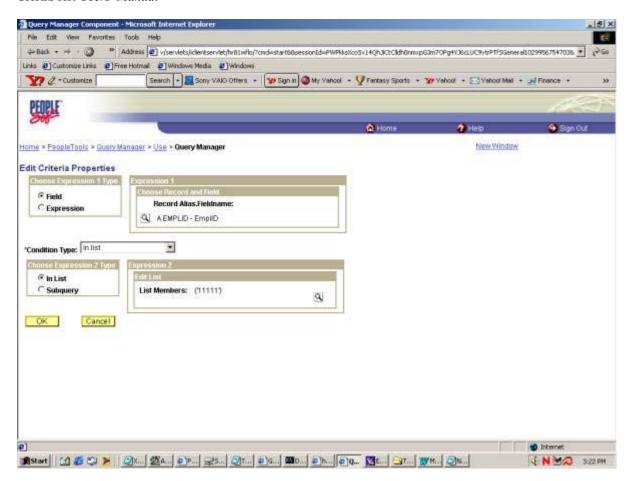
#### Instructions:

- 1. Open the Notice\_WGI\_Certification
- 2. Click the searchstring Tab
- 3. Click Add searchstring
- 4. Choose a Record. Field Name (Emplid)
- 5. Select In List from the Condition Type Drop Down List
- 6. Under Expression 2, Click the Prompt Button for the List Members
- 7. In the Value Edit Box Enter '11111'



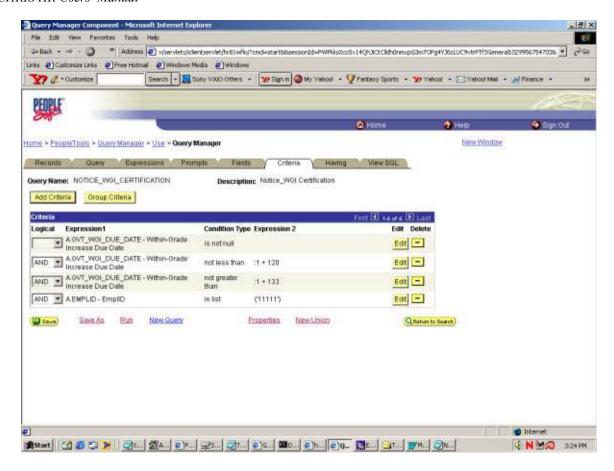


- 8. Click Add Value.
- 9. Continue Steps 7 and 8 until all chosen emplids have been added to the list.
- 10. Click OK.



11. Click OK again.

### CHRIS HR Users' Manual



# **Generating A PAR Remarks Report**

The **PAR Remarks** report is a list of all **Remark Codes**. To generate this report:

### Define Business Rules > Manage Human Resources (USF) > DOE Report > PAR Remarks

- 1. Select PAR Remarks.
- 2. Click on Add a New Value.
- 3. Run Control ID PARRMK.
- 4. Click **Add** You will only have to use **Add a New Value** the first time you generate this report. Every time after you can use "PARRMK."
- 5. Click on Save.
- 6. Click on Run.
- 7. When the Process Scheduler Request screen appears, select **Server Name**: PSNT.
- 8. Verify under **Process List** that the **Type**: Web and **Format**: PDF.
- Click OK.
- 10. Record the process instance number.
- 11. Click on **Report Manager** and scroll to the right side of the page and click on **Refresh** until you see <u>View</u> appear next to your report. Click on <u>View</u>.
- 12. Maximize the **Report/Log Viewer** page.
- 13. On the **Report/Log Viewer** page click on the report with the **.PDF** extension.
- 14. Adobe Acrobat will open.
- 15. Click on the printer icon and make adjustments to your report so it prints properly. These adjustments may include selecting "Portrait" or "Landscape" orientation or selecting "Shrink oversized pages to paper size."
- 16. Once the report appears in the print preview display as you want to see it printed, click OK to send it to the printer.

# **PAR Remarks**

## 2/10/2004

Remark Code	Remark
A01	Appointment is on a seasonal basis; the employee is subject to release to nonpay status and recall to duty to meet workload requirements as a condition of employment in accordance with the attached agreement.
A03	This appointment is intended to continue for 2 years. Upon satisfactory completion of 2-year trial period, you will be noncompetitively converted to career-conditional appointment. If performance is not satisfactory, or you fail to satisfactorily complete program, employment will be terminated.
A04	Appointment is NTE 2 years. Upon satisfactory completion of internship, you may be noncompetitively converted to career or career conditional appointment. If your performance is not satisfactory or if you fail to satisfactorily complete internship, employment will be terminated.
A07	Employment under this appointment must not exceed **** hours a year.
A08	Total employment under this and previous appointment must not exceed **** hours a year.
A11	Employment under this appointment must not exceed **** working days a year.
A12	Employment under this and previous appointment must not exceed **** working days a year.
A15	Total compensation during service year must not exceed 40% of salary for GS-3/1; salary increase resulting from a within-grade increase will not count against this limitation.
A17	As a reemployed annuitant, you serve at the will of the appointing officer.
A21	Temporary employees serve under appointments limited to 1-year or less and are subject to termination at any time without use of adverse action or reduction-in-force procedures. A temporary appointment does not confer eligibility to be promoted or reassigned to other positions, or the ability to be noncompetitively converted to career-conditional appointment.
A22	This appointment cannot be renewed. Upon admission to the Bar, you will be eligible for appointment as attorney in accordance with ******** appointment procedures.
A24	Employee informed in advance of the conditions of appointment under the Presidential Management Intern Program.

1/2004 10.1-15

## Generating An Accessions by Bargaining Unit Report

The Accessions by Bargaining Unit will generate based on BUS Code designation. To generate this report:

## Define Business Rules > Manage Human Resources (USF) > DOE Report > Accessions by Bargaining Unit

- 1. Select Accessions by Bargaining Unit Report.
- 2. Click on Add a New Value.
- 3. Run Control ID ACCBARGUNIT.
- 4. Click **Add** You will only have to use **Add a New Value** the first time you generate this report. Every time after you can use "ACCBARGUNIT."
- 5. Enter **From Date** and **Thru Date** for the time period on which you wish to report.
- 6. Enter the **Sub-Agency** or **Sub-Agencies** for which you wish to generate the report. You can enter the two-digit code if you know it or click on the magnifying glass and select from list. To add more than one **Sub-Agency**, press (+) to add a row for the next **Sub-Agency**.
- 7. Enter the **BUS Code**. You can enter the four-digit code if you know it or click on the magnifying glass and select from list. To add more than one **BUS Code**, press (+) to add a row for the next **BUS Code**. Follow this process until you have selected each one you wish to report on.
- 8. Click Save.
- 9. Click on Run.
- 10. When the Process Scheduler Request screen appears, select **Server Name**: PSNT.
- 11. Verify under **Process List** that the **Type**: Web and **Format**: PDF.
- 12. Click OK.
- 13. Record the process instance number.
- 14. Click on **Report Manager** and scroll to the right side of the page and click on **Refresh** until you see <u>View</u> appear next to your report. Click on <u>View</u>.
- 15. Maximize the **Report/Log Viewer** page.
- 16. On the **Report/Log Viewer** page click on the report with the **.PDF** extension.
- 17. Adobe Acrobat will open.

- 18. Click on the printer icon and make adjustments to your report so it prints properly. These adjustments may include selecting "Portrait" or "Landscape" orientation or selecting "Shrink oversized pages to paper size."
- 19. Once the report appears in the print preview display as you want to see it printed, click OK to send it to the printer.

Report ID: NRHR013

U.S. DEPARTMENT OF ENERGY
BARGAINING UNIT ACCESSIONS LIST
National Energy Technology Laboratory
From 01-JAN-2003 Thru 10-NOV-2003

Page No. 1
Run Date 02/10/2004
Run Time 08:09:49

				Series/			Action		Bargain
Deptid	Department Name	Name	Title	Grade	City	State	Code	Action Date	Unit ID

## **Generating A Terminations by Bargaining Unit Report**

The **Terminations by Bargaining Unit** will generate based on BUS Code designation. To generate this report:

# Define Business Rules > Manage Human Resources (USF) > DOE Report > Terminations by Bargaining Unit

- 1. Select **Terminations by Bargaining Unit**.
- 2. Click on Add a New Value.
- 3. **Run Control ID** TERMBARGUNIT.
- 4. Click **Add** You will only have to use **Add a New Value** the first time you generate this report. Every time after you can use "TERMBARGUNIT."
- 5. Enter **From Date** and **Thru Date** for the time period on which you wish to report.
- 6. Click on **Save**.
- 7. Click on **Run**.
- 8. When the Process Scheduler Request screen appears, select **Server Name**: PSNT.
- 9. Verify under **Process List** that the **Type**: Web and **Format**: PDF.
- 10. Click **OK**.
- 11. Record the process instance number.
- 12. Click on **Report Manager** and scroll to the right side of the page and click on **Refresh** until you see <u>View</u> appear next to your report. Click on <u>View</u>.
- 13. Maximize the **Report/Log Viewer** page.
- 14. On the **Report/Log Viewer** page click on the report with the **.PDF** extension.
- 15. Adobe Acrobat will open.
- 16. Click on the printer icon and make adjustments to your report so it prints properly. These adjustments may include selecting "Portrait" or "Landscape" orientation or selecting "Shrink oversized pages to paper size."
- 17. Once the report appears in the print preview display as you want to see it printed, click OK to send it to the printer.

Report ID: NRHR027 U.S. DEPARTMENT OF ENERGY Page No. 16

TERMINATIONS BY BARGAINING UNIT

From 31-OCT-2003 Thru 13-NOV-2003

Run Time: 08:25:21

TIOM ST OCT 2003 THE TS NOV 20

SUB-AGENCY:

TERM DATE	NOA - R E A S O N	EMPLID NAME	TITLE	PAY PLN	OCC SER	GR LOCATION	SEX	BARG UNIT
21112						011 2001112011		01111
10/31/2003	317 Resignation						М	8888
11/01/2003	303 Retirement-Special Option						F	7777
11/01/2003	352 Termination-Appt in						F	7777
11/01/2003	352 Termination-Appt in						F	8888
11/01/2003	352 Termination-Appt in						F	7777

TOTAL TERMINATIONS FOR SUB-AGENCY

End of Report

## **Generating An Alpha List Of Active Employees**

The **Alpha List of Active Employees** report is used to print a listing of employees who are in an active status. To generate this report:

## Define Business Rules > Manage Human Resources (USF) > DOE Report > Alpha List of Active Employees

- 1. Select Alpha List of Active Employees.
- 2. Click on Add a New Value.
- 3. **Run Control ID** ALPHA.
- 4. Click **Add** You will only have to use **Add a New Value** the first time you generate this report. Every time after you can use "ALPHA."
- 5. Enter the **Sub-Agency** or **Sub-Agencies** for which you wish to generate the report. You can enter the two-digit code if you know it or click on the magnifying glass and select from list. To add more than one **Sub-Agency**, press (+) to add a row for the next **Sub-Agency**.
- 6. Click on Save.
- 7. Click on **Run**.
- 8. When the Process Scheduler Request screen appears, select **Server Name**: PSNT.
- 9. Verify under **Process List** that the **Type**: Web and **Format**: PDF.
- 10. Click **OK**.
- 11. Record the process instance number.
- 12. Click on **Report Manager** and scroll to the right side of the page and click on **Refresh** until you see <u>View</u> appear next to your report. Click on **View**.
- 13. Maximize the **Report/Log Viewer** page.
- 14. On the **Report/Log Viewer** page click on the report with the **.PDF** extension.
- 15. Adobe Acrobat will open.
- 16. Click on the printer icon and make adjustments to your report so it prints properly. These adjustments may include selecting "Portrait" or "Landscape" orientation or selecting "Shrink oversized pages to paper size."
- 17. Once the report appears in the print preview display as you want to see it printed, click OK to send it to the printer.

Report ID: NRHR003 DEPARTMENT OF ENERGY

Page No: 1 Run Date: 11/13/2003 ALPHABETICAL ROSTER OF ACTIVE EMPLOYEES

Run Time: 08:39:38

PERSONAL DATA - - TO BE TREATED IN A CONFIDENTIAL MANNER (P.L. 93-579)

Selected Sub-Agencies:

		BIRTH	SUB				PAY	OCC				${ t FULL}/$		
EMPLOYEE NAME	SSN	DATE	AGN	POI	DEPT ID	POSITION#	PLN	SER	GR	ST	SALARY	PART	DUTY	STATION

End of Report

## **Generating A User Workload Report**

The **User Workload Report** will generate a count of actions processed by **NOA Code** and Operator ID's within a *Sub-Agency*. To generate this report:

## Define Business Rules > Manage Human Resources (USF) > DOE Report > User Workload Report

- 1. Select User Workload Report.
- 2. Click on Add a New Value.
- 3. **Run Control ID** WORKLOAD.
- 4. Click **Add** You will only have to use **Add a New Value** the first time you generate this report. Every time after you can use "WORKLOAD."
- 5. Enter the **Sub-Agency** or **Sub-Agencies** for which you wish to generate the report. You can enter the two-digit code if you know it or click on the magnifying glass and select from list. To add more than one **Sub-Agency**, press (+) to add a row for the next **Sub-Agency**.
- 6. Click on Save.
- 7. Click on Run.
- 8. When the Process Scheduler Request screen appears, select Server Name: PSNT.
- 9. Verify under **Process List** that the **Type**: Web and **Format**: PDF.
- 10. Click OK.
- 11. Record the process instance number.
- 12. Click on **Report Manager** and scroll to the right side of the page and click on **Refresh** until you see <u>View</u> appear next to your report. Click on <u>View</u>.
- 13. Maximize the **Report/Log Viewer** page.
- 14. On the **Report/Log Viewer** page click on the report with the **.PDF** extension.
- 15. Adobe Acrobat will open.
- 16. Click on the printer icon and make adjustments to your report so it prints properly. These adjustments may include selecting "Portrait" or "Landscape" orientation or selecting "Shrink oversized pages to paper size."
- 17. Once the report appears in the print preview display as you want to see it printed, click OK to send it to the printer.

Report ID: NRHR026	DEPARTMENT OF ENERGY	Page No. 5 Run Date: 11/13/2003
	USER WORK LOAD REPORT	Run Time: 08:45:09
	FROM 10/15/2003 THRU 11/01/2003	
	<u> </u>	

#### Operator ID:

702	Promotion	1
840	Individual Cash	1
893	Award	1
894	WGI	1
966	Pay Adj	1
CAN	Change/Correct Non-	0
COR	SF50	0
	Cancelled	
	Corrected	

TOTAL: 5

End of Report

Report ID: NRHR026	DEPARTMENT OF ENERGY	Page No.	6
		Run Date:	11/13/2003

### USER WORK LOAD REPORT

FROM 10/15/2003 THRU 11/01/2003

#### SUBAGENCY SUMMARY

893	WGI	9
840	Individual Cash	3
101	Award	2
702	Career-Cond Appt	3
703	Promotion	2
847	Promotion NTE	2
881	Group Time-Off	1
894	Award	1
966	Federal Employees	1
CAN	Group	0
COR	Pay Adj	1
	Change/Correct Non-	
	SF50	
	Cancelled	
	Corrected	

GRAND TOTAL:

========

25

Run Time: 08:45:09

End of Report

## **Generating An Awards Report**

The **Awards Report** will generate a list of awards by **NOA Code** for employees within a *Sub-Agency*. To generate this report:

#### Define Business Rules > Manage Human Resources (USF) > DOE Report > Awards Report

- 1. Select Awards Report.
- Click on Add a New Value.
- 3. **Run Control ID** AWARDS.
- 4. Click **Add** You will only have to use **Add a New Value** the first time you generate this report. Every time after you can use "AWARDS."
- 18. Enter **From Date** and **Thru Date** for the time period on which you wish to report.
- 5. Enter the **Sub-Agency** or **Sub-Agencies** for which you wish to generate the report. You can enter the two-digit code if you know it or click on the magnifying glass and select from list. To add more than one **Sub-Agency**, press (+) to add a row for the next **Sub-Agency**.
- 6. Enter the **NOAC** or **NOAC's** for which you wish to generate the report. You can enter the three-digit code if you know it or click on the magnifying glass and select from the list. To add more than once **NOAC**, press (+) to add a row for the next **NOAC**. Follow this process until you have selected each **NOAC** you wish to report on.
- 7. Click on **Save**.
- 8. Click on **Run**.
- 9. When the Process Scheduler Request screen appears, select **Server Name**: PSNT.
- 10. Verify under **Process List** that the **Type**: Web and **Format**: PDF.
- 11. Click **OK**.
- 12. Record the process instance number.
- 13. Click on **Report Manager** and scroll to the right side of the page and click on **Refresh** until you see <u>View</u> appear next to your report. Click on <u>View</u>.
- 14. Maximize the **Report/Log Viewer** page.
- 15. On the **Report/Log Viewer** page click on the report with the **.PDF** extension.
- 16. Adobe Acrobat will open.

- 17. Click on the printer icon and make adjustments to your report so it prints properly. These adjustments may include selecting "Portrait" or "Landscape" orientation or selecting "Shrink oversized pages to paper size."
- 18. Once the report appears in the print preview display as you want to see it printed, click OK to send it to the printer.

Report ID: NRHR015

6/2004

U.S. DEPARTMENT OF ENERGY
AWARDS REPORT
National Energy Technology Laboratory
From 01-JAN-2004 Thru 26-JUN-2004

Page No. 5
Run Date 07/09/2004
Run Time 10:59:58

Amount in Dollars Amount in Hours Empl Status Eff Date



10.1-28

### **Generating A Bargaining Unit Employees Report**

The **Bargaining Unit Employees Report** will generate a list of employees by designated **BUS Code**. To generate this report:

# Define Business Rules > Manage Human Resources (USF) > DOE Report > Bargaining Unit Employees Report

- 1. Select Bargaining Unit Employees Report.
- 2. Click on Add a New Value.
- Run Control ID BARGUNIT.
- 4. Click **Add** You will only have to use **Add a New Value** the first time you generate this report. Every time after you can use "BARGUNIT."
- 5. Enter the **Sub-Agency** or **Sub-Agencies** for which you wish to generate the report. You can enter the two-digit code if you know it or click on the magnifying glass and select from list. To add more than one **Sub-Agency**, press (+) to add a row for the next **Sub-Agency**.
- 6. Enter the **BUS Code**. You can enter the four-digit code if you know it or click on the magnifying glass and select from list. To add more than one **BUS Code**, press (+) to add a row for the next **BUS Code**. Follow this process until you have selected each one you wish to report on.
- 7. Click on Save.
- 8. Click on Run.
- 9. When the Process Scheduler Request screen appears, select **Server Name**: PSNT.
- 10. Verify under **Process List** that the **Type**: Web and **Format**: PDF.
- 11. Click **OK**.
- 12. Record the process instance number.
- 13. Click on **Report Manager** and scroll to the right side of the page and click on **Refresh** until you see <u>View</u> appear next to your report. Click on <u>View</u>.
- 14. Maximize the **Report/Log Viewer** page.
- 15. On the **Report/Log Viewer** page click on the report with the **.PDF** extension.
- 16. Adobe Acrobat will open.

- 17. Click on the printer icon and make adjustments to your report so it prints properly. These adjustments may include selecting "Portrait" or "Landscape" orientation or selecting "Shrink oversized pages to paper size."
- 18. Once the report appears in the print preview display as you want to see it printed, click OK to send it to the printer.

Report ID: NRHR014

U.S. DEPARTMENT OF ENERGY
BARGAINING UNIT EMPLOYEES
Carlsbad Field Office
As of 11-JAN-2004

Page No. 2 Run Date 01/20/2004 Run Time 10:47:39

			Grade or		Bargain
Employee Name	SSN	Series	Level	Position Title	Unit ID
=======================================	========	=====	======	======= <del>===</del> ==========================	======
					7777
					7777
					7777
					7777
					7777
					7777
			4		7777

## **Generating An Organization Report**

The **Organization Report** is used to print a listing of employees who are in an active status by organization. To generate this report:

## Define Business Rules > Manage Human Resources (USF) > DOE Report > Organization Report

- 1. Select Organization Report.
- 2. Click on Add a New Value.
- 3. **Run Control ID** ORGRPT.
- 4. Click **Add** You will only have to use **Add a New Value** the first time you generate this report. Every time after you can use "ORGRPT."
- 5. Enter the **Sub-Agency** or **Sub-Agencies** for which you wish to generate the report. You can enter the two-digit code if you know it or click on the magnifying glass and select from list. To add more than one **Sub-Agency**, press (+) to add a row for the next **Sub-Agency**.
- 6. Enter **Department** or **Departments** for which you wish to generate report. You can enter the ten-digit code if you know it or click on the magnifying glass and select them from the list available. To add more than one **Department**, press (+) to add a row for the next **Department**. Follow this procedure until you have selected each **Department** you wish to report on. If you do not select a specific **Department** for the sub agency entered, then all **Departments** for that sub agency will print.
- 7. If you try to select a **Department** without entering a sub agency, the system will give you an error of "*No records found matching specified key(s)*." Therefore, you must enter or select a **Sub-Agency** or select a specific **Department**.
- 8. Click on Save.
- 9. Click on Run.
- 10. When the Process Scheduler Request screen appears, select Server Name: PSNT.
- 11. Verify under **Process List** that the **Type**: Web and **Format**: PDF.
- 12. Click OK.
- 13. Record the process instance number.
- 14. Click on Report Manager and scroll to the right side of the page and click on Refresh until you see <u>View</u> appear next to your report. Click on <u>View</u>.

- 15. Maximize the Report/Log Viewer page.
- 16. On the **Report/Log Viewer** page click on the report with the **.PDF** extension.
- 17. Adobe Acrobat will open.
- 18. Click on the printer icon and make adjustments to your report so it prints properly. These adjustments may include selecting "Portrait" or "Landscape" orientation or selecting "Shrink oversized pages to paper size."
- 19. Once the report appears in the print preview display as you want to see it printed, click OK to send it to the printer.

DEPARTMENT OF ENERGY

Report ID: NRHR005 NATIONAL ENERGY TECHNOLOGY LABORATORY Page No. 1

> ORGANIZATION ROSTER Run Date: 11/17/2003 Run Time: 10:58:38

PERSONAL DATA - - TO BE TREATED IN A CONFIDENTIAL MANNER (P.L. 93-579)

VET

PAY OCC SALARY/ WRK TNR MGR PRF EMP SERV CMP POSN BIRTH EMPLOYEE NAME POSITION TITLE PLAN SER GR ST PAY RATE SCH GRP LVL FLSA APT STS DATE NUMBER DATE

Division

FULL-TIME FULL-TIME TOTAL LTD SEV TOTAL TOTAL ANNUAL

PERMANENT TEMPORARY PART-TIME INTERMITTENT YEAR-F-T OTHER EMPLOYEES SALARY COSTS

Total this organization:

FULL-TIME FULL-TIME TOTAL LTD SEV TOTAL TOTAL

PERMANENT TEMPORARY PART-TIME INTERMITTENT YEAR-F-T OTHER EMPLOYEES SALARY COSTS

SUB-AGENCY TOTALS:

End of Report

## **Generating A Service Awards Report**

The **Service Awards** report is used to find employees who have 10, 20, 25, 30, 35, 40, 45, or 50 years of service and are eligible for a service award. To generate this report:

## Define Business Rules > Manage Human Resources (USF) > DOE Report > Service Awards Report

- 1. Select Service Awards Report.
- Click on Add a New Value.
- 3. Run Control ID SVCAWDS.
- 4. Click **Add** You will only have to use **Add a New Value** the first time you generate this report. Every time after you can use "SVCAWDS."
- 5. Enter From Date and Thru Date for the time period on which you wish to report.
- 6. Enter the **Sub-Agency** or **Sub-Agencies** for which you wish to generate the report. You can enter the two-digit code if you know it or click on the magnifying glass and select from list. To add more than one **Sub-Agency**, press (+) to add a row for the next **Sub-Agency**.
- 7. Click on Save.
- 8. Click on Run.
- 9. When the Process Scheduler Request screen appears, select **Server Name**: PSNT.
- 10. Verify under **Process List** that the **Type**: Web and **Format**: PDF.
- 11. Click OK.
- 12. Record the process instance number.
- 13. Click on **Report Manager** and scroll to the right side of the page and click on **Refresh** until you see <u>View</u> appear next to your report. Click on <u>View</u>.
- 14. Maximize the Report/Log Viewer page.
- 15. On the **Report/Log Viewer** page click on the report with the **.PDF** extension.
- 16. Adobe Acrobat will open.
- 17. Click on the printer icon and make adjustments to your report so it prints properly. These adjustments may include selecting "Portrait" or "Landscape" orientation or selecting "Shrink oversized pages to paper size."
- 18. Once the report appears in the print preview display as you want to see it printed, click OK to send it to the printer.

Page No. 1 Run Date: 11/17/2003 Report ID: NRHR002 DEPARTMENT OF ENERGY

LENGTH OF SERVICE AWARD ELIGIBILITY LISTING FROM 10/01/2003 THRU 11/01/2003 Run Time: 11:05:08

EMPLOYEE NAME ORG CODE ORGANIZATION TITLE SERVICE COMP DATE SUBAGENCY

End of Report

Page No. 1 Run Date: 11/17/2003 Report ID: NRHR002 DEPARTMENT OF ENERGY

LENGTH OF SERVICE AWARD ELIGIBILITY LISTING FROM 10/01/2003 THRU 11/01/2003 Run Time: 11:05:08

EMPLOYEE NAME ORG CODE ORGANIZATION TITLE SERVICE COMP DATE SUBAGENCY

End of Report

Page No. 1 Run Date: 11/17/2003 Report ID: NRHR002 DEPARTMENT OF ENERGY

LENGTH OF SERVICE AWARD ELIGIBILITY LISTING FROM 10/01/2003 THRU 11/01/2003 Run Time: 11:05:08

EMPLOYEE NAME ORG CODE ORGANIZATION TITLE SERVICE COMP DATE SUBAGENCY

End of Report

### **Generating SSN List of Active Employees**

The **SSN List of Active Employees** report is a list of all active employees by Social Security Number (**SSN**). To generate this report:

## Define Business Rules > Manage Human Resources (USF) > DOE Report > SSN List of Active Employees

- 1. Select SSN List of Active Employees.
- 2. Click on Add a New Value.
- 3. Run Control ID SSNRPT
- 4. Click **Add** You will only have to use **Add a New Value** the first time you generate this report. Every time after you can use "SSNRPT."
- 5. Enter the **Sub-Agency** or **Sub-Agencies** for which you wish to generate the report. You can enter the two-digit code if you know it or click on the magnifying glass and select from list. To add more than one **Sub-Agency**, press (+) to add a row for the next **Sub-Agency**.
- 6. Click on Save.
- 7. Click on Run.
- 8. When the Process Scheduler Request screen appears, select **Server Name**: PSNT.
- 9. Verify under **Process List** that the **Type**: Web and **Format**: PDF.
- 10. Click **OK**.
- 11. Record the process instance number.
- 12. Click on **Report Manager** and scroll to the right side of the page and click on **Refresh** until you see <u>View</u> appear next to your report. Click on <u>View</u>.
- 13. Maximize the **Report/Log Viewer** page.
- 14. On the **Report/Log Viewer** page click on the report with the **.PDF** extension.
- 15. Adobe Acrobat will open.
- 16. Click on the printer icon and make adjustments to your report so it prints properly. These adjustments may include selecting "Portrait" or "Landscape" orientation or selecting "Shrink oversized pages to paper size."
- 17. Once the report appears in the print preview display as you want to see it printed, click OK to send it to the printer.

Report ID: NRHR004 DEPARTMENT OF ENERGY

Page No. 1 Run Date: 11/17/2003 ACTIVE EMPLOYEES LIST BY SSN

Run Time: 12:33:49

PERSONAL DATA - - TO BE TREATED IN A CONFIDENTIAL MANNER (P.L. 93-579)

Selected Sub-Agencies: NT

PAY OCC FULL/ BIRTH SUB

POI DEPT ID POSITION # PLN SER PART DUTY STATION SSN EMPLOYEE NAME DATE AGN GR SALARY

End of Report

## **Generating An REQ/INI Stat Report**

The **REQ/INI Stat Report** is used to identify personnel actions that are still in *REQ/INI* **PAR Status** for your *Sub-Agency* by *User ID*. To generate this report:

#### Define Business Rules > Manage Human Resources (USF) > DOE Report > REQ/INI Stat Report

- 1. Select REQ/INI Stat Report.
- 2. Click on Add a New Value.
- 3. **Run Control ID** REQ/INISTAT.
- 4. Click **Add** You will only have to use **Add a New Value** the first time you generate this report. Every time after you can use "REQ/INISTAT."
- 5. Enter From Date and Thru Date for the time period on which you wish to report.
- 6. Enter the **Sub-Agency** or **Sub-Agencies** for which you wish to generate the report. You can enter the two-digit code if you know it or click on the magnifying glass and select from list. To add more than one **Sub-Agency**, press (+) to add a row for the next **Sub-Agency**.
- 7. Click on Save.
- 8. Click on Run.
- 9. When the Process Scheduler Request screen appears, select **Server Name**: PSNT.
- 10. Verify under **Process List** that the **Type**: Web and **Format**: PDF.
- 11. Click **OK**.
- 12. Record the process instance number.
- 13. Click on **Report Manager** and scroll to the right side of the page and click on **Refresh** until you see <u>View</u> appear next to your report. Click on <u>View</u>.
- 14. Maximize the Report/Log Viewer page.
- 15. On the **Report/Log Viewer** page click on the report with the **.PDF** extension.
- 16. Adobe Acrobat will open.
- 17. Click on the printer icon and make adjustments to your report so it prints properly. These adjustments may include selecting "Portrait" or "Landscape" orientation or selecting "Shrink oversized pages to paper size."
- 18. Once the report appears in the print preview display as you want to see it printed, click OK to send it to the printer.

Report ID: NRHR024 DEPARTMENT OF ENERGY

Page No. 1 Run Date: 11/17/2003 LIST OF ACTIONS IN REQ AND INI STATUS FROM 11/01/2003 THRU 12/31/2003 Run Time: 12:40:21

					~~~~~~		
EFFDT	EMPLID	NAME	NOA CODE	REASON	CREATED ON	LAST UPDATED	WIP STATUS

Operator ID:

11/07/2003 11/16/2003 11/07/2003 REQ

Operator ID Total: 1

SubAgency Total:

End of Report

## **Generating A Department Managers Report**

The **Department Managers Report** is used generate a list of the Department Table with the Manager assigned to each department.

# Define Business Rules > Manage Human Resources (USF) > DOE Report > Department Managers Report

- 1. Select Department Managers Report.
- Click on Add a New Value.
- Run Control ID DEPTMGR.
- 4. Click **Add** You will only have to use **Add a New Value** the first time you generate this report. Every time after you can use "DEPTMGR."
- 5. Enter the **Sub-Agency** or **Sub-Agencies** for which you wish to generate the report. You can enter the two-digit code if you know it or click on the magnifying glass and select from list. To add more than one **Sub-Agency**, press (+) to add a row for the next **Sub-Agency**.
- 6. Click on Save.
- 7. Click on Run.
- 8. When the Process Scheduler Request screen appears, select **Server Name**: PSNT.
- 9. Verify under **Process List** that the **Type**: Web and **Format**: PDF.
- 10. Click **OK**.
- 11. Record the process instance number.
- 12. Click on **Report Manager** and scroll to the right side of the page and click on **Refresh** until you see <u>View</u> appear next to your report. Click on <u>View</u>.
- 13. Maximize the **Report/Log Viewer** page.
- 14. On the **Report/Log Viewer** page click on the report with the **.PDF** extension.
- 15. Adobe Acrobat will open.
- 16. Click on the printer icon and make adjustments to your report so it prints properly. These adjustments may include selecting "Portrait" or "Landscape" orientation or selecting "Shrink oversized pages to paper size."
- 17. Once the report appears in the print preview display as you want to see it printed, click OK to send it to the printer.

Report ID: NRHR029a DEPARTMENT OF ENERGY

Page No. 1 Run Date: 11/17/2003 DEPARTMENT MANAGER REPORT Run Time: 12:43:36

PERSONAL DATA - - TO BE TREATED IN A CONFIDENTIAL MANNER (P.L. 93-579)

Manager Position Department Manager

End of Report

10.1-42 1/2004

### **Generating A "Reports to" Report**

The **Department Managers Report** is used generate a list of each employee within their sub-agency and the their supervisor from the position data and employment data record.

## Define Business Rules > Manage Human Resources (USF) > DOE Report > "Reports to" Report

- 1. Select **Reports To Report**.
- 2. Click on Add a New Value.
- 3. Run Control ID RPTTO.
- 4. Click **Add** You will only have to use **Add a New Value** the first time you generate this report. Every time after you can use "RPTTO."
- 5. Enter **Department(s)** or **Sub-Agency(s)** for which you wish to generate report. You can enter the ten-digit Department code or the two-digit sub-agency code if you know it or click on the magnifying glass and select them from the list available. To add more than one **Department**, press (+) to add a row for the next **Department**. Follow this procedure until you have selected each **Department** you wish to report on. If you do not select a specific **Department** for the sub agency entered, then all **Departments** for that sub agency will print.
- 6. Click on Save.
- 7. Click on **Run**.
- 8. When the Process Scheduler Request screen appears, select **Server Name**: PSNT.
- 9. Verify under **Process List** that the **Type**: Web and **Format**: PDF.
- 10. Click OK.
- 11. Record the process instance number.
- 12. Click on **Report Manager** and scroll to the right side of the page and click on **Refresh** until you see <u>View</u> appear next to your report. Click on <u>View</u>.
- 13. Maximize the **Report/Log Viewer** page.
- 14. On the **Report/Log Viewer** page click on the report with the **.PDF** extension.
- 15. Adobe Acrobat will open.
- 16. Click on the printer icon and make adjustments to your report so it prints properly. These adjustments may include selecting "Portrait" or "Landscape" orientation or selecting "Shrink oversized pages to paper size."
- 17. Once the report appears in the print preview display as you want to see it printed, click OK to send it to the printer.

Report ID: NRHR029b DEPARTMENT OF ENERGY

Page No. 1 Run Date: 11/17/2003 "REPORTS TO" REPORT

Run Time: 12:46:21

PERSONAL DATA - - TO BE TREATED IN A CONFIDENTIAL MANNER (P.L. 93-579)

Employee "Reports to"
Position Emplid Name Emplid Employee Position Position "Reports to" Department Position Emplid Name

End of Report

## **Generating A "Reports to" Difference Report**

The "Reports to" Difference Report is used generates a list of differences that exist between the employees position data record and the employment data record.

### Define Business Rules > Manage Human Resources (USF) > DOE Report > "Reports to" Difference Report

- 1. Select Reports To Difference Report.
- 2. Click on Add a New Value.
- 3. Run Control ID RPTTODIFF
- 4. Click **Add** You will only have to use **Add a New Value** the first time you generate this report. Every time after you can use "RPTTODIFF."
- 5. Enter **Department(s)** or **Sub-Agency(s)** for which you wish to generate report. You can enter the ten-digit Department code or the two-digit sub-agency code if you know it or click on the magnifying glass and select them from the list available. To add more than one **Department**, press (+) to add a row for the next **Department**. Follow this procedure until you have selected each **Department** you wish to report on. If you do not select a specific **Department** for the sub agency entered, then all **Departments** for that sub agency will print.
- 6. Click on Save.
- 7. Click on **Run**.
- 8. When the Process Scheduler Request screen appears, select **Server Name**: PSNT.
- 9. Verify under **Process List** that the **Type**: Web and **Format**: PDF.
- 10. Click OK.
- 11. Record the process instance number.
- 12. Click on **Report Manager** and scroll to the right side of the page and click on **Refresh** until you see <u>View</u> appear next to your report. Click on <u>View</u>.
- 13. Maximize the Report/Log Viewer page.
- 14. On the **Report/Log Viewer** page click on the report with the **.PDF** extension.
- 15. Adobe Acrobat will open.
- 16. Click on the printer icon and make adjustments to your report so it prints properly. These adjustments may include selecting "Portrait" or "Landscape" orientation or selecting "Shrink oversized pages to paper size."

Once the report appears in the print preview display as you want to see it printed, click OK to send it to the printer.

Report ID: NRHR029c DEPARTMENT OF ENERGY Page No. 1

Run Date: 11/17/2003 "REPORTS TO" DIFFERENCES Run Time: 12:52:37

PERSONAL DATA - - TO BE TREATED IN A CONFIDENTIAL MANNER (P.L. 93-579)

Department Emplid Employee Position Employee "Reports to" Position "Reports to" Position Emplid Name Position Emplid Name

No Differences Found

End of Report

## **Generating A Job Code Table Report**

The **Job Code Table** report is a list of all **Job Codes** within your *Sub-Agency*. To generate this report:

#### Develop Workforce > Manage Positions (USF) > DOE Report > Job Code Table Report

- 1. Select Job Code Table Report.
- Click on Add a New Value.
- 3. Run Control ID JOBCODE.
- 4. Click **Add** You will only have to use **Add a New Value** the first time you generate this report. Every time after you can use "JOBCODE."
- 5. Enter the **Sub-Agency** or **Sub-Agencies** for which you wish to generate the report. You can enter the two-digit code if you know it or click on the magnifying glass and select from list. To add more than one **Sub-Agency**, press (+) to add a row for the next **Sub-Agency**.
- 6. Click on Save.
- 7. Click on **Run**.
- 8. When the Process Scheduler Request screen appears, select **Server Name**: PSNT.
- 9. Verify under **Process List** that the **Type**: Web and **Format**: PDF.
- 10. Click **OK**.
- 11. Record the process instance number.
- 12. Click on **Report Manager** and scroll to the right side of the page and click on **Refresh** until you see <u>View</u> appear next to your report. Click on <u>View</u>.
- 13. Maximize the **Report/Log Viewer** page.
- 14. On the **Report/Log Viewer** page click on the report with the **.PDF** extension.
- 15. Adobe Acrobat will open.
- 16. Click on the printer icon and make adjustments to your report so it prints properly. These adjustments may include selecting "Portrait" or "Landscape" orientation or selecting "Shrink oversized pages to paper size."

Once the report appears in the print preview display as you want to see it printed, click OK to send it to the printer.

Report ID: NRHR017 DEPARTMENT OF ENERGY Page No. 1
Run Date: 11/17/2003

SUB-AGENCY: POI: Run Time: 13:02:41

ACTIVE JOB CODE TABLE

PATCOB FLSA Job Pay Occ Pay Emp Exec Pay Pln Stat Tbl Dscl Code Ser Title Code Intrst

End of Report

## **Generating An Official Position Titles Report**

The Official Position Titles report is a list of all Official Position Titles. To generate this report:

#### Develop Workforce > Manage Positions (USF) > DOE Report > Official Position Titles Report

- 1. Select Official Position Titles Report.
- 2. Click on Add a New Value.
- 3. Run Control ID PSNTTLRPT.
- 4. Click **Add** You will only have to use **Add a New Value** the first time you generate this report. Every time after you can use "PSNTTLRPT."
- 5. Click on Save.
- 6. Click on Run.
- 7. When the Process Scheduler Request screen appears, select **Server Name**: PSNT.
- 8. Verify under **Process List** that the **Type**: Web and **Format**: PDF.
- 9. Click OK.
- 10. Record the process instance number.
- 11. Click on **Report Manager** and scroll to the right side of the page and click on **Refresh** until you see <u>View</u> appear next to your report. Click on **View**.
- 12. Maximize the **Report/Log Viewer** page.
- 13. On the **Report/Log Viewer** page click on the report with the **.PDF** extension.
- 14. Adobe Acrobat will open.
- 15. Click on the printer icon and make adjustments to your report so it prints properly. These adjustments may include selecting "Portrait" or "Landscape" orientation or selecting "Shrink oversized pages to paper size."
- 16. Once the report appears in the print preview display as you want to see it printed, click OK to send it to the printer.

Report ID: NRHR021 Official Position Titles Page No.

Page No. 1 Report Date: 11/17/2003 Report Time: 1:13:54PM

	Official	Official	
Occupational Series	Title Code	Position Title	Effective Date
0018	0006	Director, Environment, Safety & Health Evaluations	1/1/1900
0018	0001	Director, Environment, Safety & Health Residents	1/1/1900
0018	0002	Director, Risk Analysis and Technology	1/1/1900
0018	0007	Lead Safety & Occupational Health Manager	1/1/1900
0018	0003	Nuclear Standards & Procedures Systems Expert	1/1/1900
0018	0004	Safety & Occupational Health Manager	1/1/1900
0018	0005	Safety & Occupational Health Specialist	1/1/1900
0018	0008	Supervisory Safety & Occupational Health Specialist	1/1/1900
0019	0001	Safety Technician	1/1/1900
0020	0001	Community Planner	1/1/1900
0020	0002	Community Planner (Native American Liaison)	1/1/1900
0023	0001	Outdoor Recreation Planner	1/1/1900
0028	0014	Deputy Assistant Secretary for Environment	1/1/1900
0028	0001	Deputy Assistant Secretary, Environment	1/1/1900
0028	0002	Deputy Director, Environment, Safety & Health Evaluations	1/1/1900
0028	0012	Dir, Ofc of National Environmental Policy Act (NEPA) Pol & Complia	1/1/1900
0028	0009	Director, Environmental Guidance	1/1/1900
0028	0003	Director, Environmental Policy & Assistance	1/1/1900
0028	0008	Director, NEPA Oversight	1/1/1900
0028	0004	Director, NEPA Policy & Assistance	1/1/1900
0028	0001	Director, Office of Environmental Policy & Guidance	1/1/1900
0028	0005	Environmental Protection Specialist	1/1/1900
0028	0010	Lead Environmental Protection Specialist	1/1/1900
0028	0006	Principal Dep Asst Secretary, Environment, Safety & Health	1/1/1900
0028	0013	Special Assistance for Compliance	1/1/1900
0028	0007	Supervisory Environmental Protection Specialist	1/1/1900
0029	0003	Environmental Assistant	1/1/1900
0029	0002	Environmental Protection Assistant	1/1/1900
0029	0001	Environmental Technician	1/1/1900
0080	0034	Cyber Security Specialist	1/1/1900
0080	0024	Dep Assoc Dep Asst Sec Technical & Environmental Support	1/1/1900
0080	0044	Deputy Director, Office of Emergency Operations	1/1/1900
0080	0058	Deputy Director, Office of Headquarters Security Operations	1/1/1900
0080	0042	Deputy Director, Office of Safeguards & Security	1/1/1900
0080	0042	Deputy Director, Safeguards & Security	1/1/1900
0080	0001	Dir, Engineering, Operations, Security & Transition Support	1/1/1900
0080	0002	Director, Field Operations Division	1/1/1900
0080	0003	Director, Headquarters Operations Division	1/1/1900
0080	0005	Director, Information Classification & Control Policy	1/1/1900
0080	0051	Director, Office of Safeguards & Security Evaluations	1/1/1900
0080	0030	Director, Office of Safeguards and Security Evaluations	1/1/1900
0080	0036	Director, Office of Security Support	1/1/1900
0080	0050	Director, Office of Security Support  Director, Office of Security Training & Education	
0080	0030	Director, Office of Security Training & Education  Director, Office of Threat Management (Transnational WMD Issues)	1/1/1900 1/1/1900
0080	0004	Director, Policy, Standards & Analysis Division	
0080	0004		1/1/1900
0000	004/	Director, Polygraph & Inspections Programs	1/1/1900

## **Generating An Organization Position Titles Report**

The Organization Position Titles report is a list of all Organization Position Titles. To generate this report:

# Develop Workforce > Manage Positions (USF) > DOE Report > Organization Position Titles Report

- 1. Select Organization Position Titles Report.
- 2. Click on Add a New Value.
- Run Control ID ORGPSNRPT.
- 4. Click **Add** You will only have to use **Add a New Value** the first time you generate this report. Every time after you can use "ORGPSNRPT."
- 5. Click on Save.
- 6. Click on Run.
- 7. When the Process Scheduler Request screen appears, select **Server Name**: PSNT.
- 8. Verify under **Process List** that the **Type**: Web and **Format**: PDF.
- 9. Click OK.
- 10. Record the process instance number.
- 11. Click on **Report Manager** and scroll to the right side of the page and click on **Refresh** until you see <u>View</u> appear next to your report. Click on <u>View</u>.
- 12. Maximize the **Report/Log Viewer** page.
- 13. On the **Report/Log Viewer** page click on the report with the .**PDF** extension.
- 14. Adobe Acrobat will open.
- 15. Click on the printer icon and make adjustments to your report so it prints properly. These adjustments may include selecting "Portrait" or "Landscape" orientation or selecting "Shrink oversized pages to paper size."

Once the report appears in the print preview display as you want to see it printed, click OK to send it to the printer.

Report ID: NRHR020 Organization (Working) Position Titles Page No. 1

Page No. 1 Report Date: 11/17/2003 Report Time: 1:13:25PM

Occupational Series	Organization Position Title Code	Organization Position Title	Effective Date
0018	0001	Director, Environment, Safety & Health Evaluations	1/1/1900
0018	0006	Director, Environment, Safety & Health Residents	1/1/1900
0018	0002	Director, Risk Analysis & Technology	1/1/1900
0018	0008	Lead Safety & Occupational Health Manager	1/1/1900
0018	0003	Nuclear Standards & Procedures Systems Expert	1/1/1900
0018	0004	Safety & Occupational Health Manager	1/1/1900
0018	0005	Safety & Occupational Health Specialist	1/1/1900
0018	0007	Safety Specialist	1/1/1900
0018	0009	Supervisory Safety & Occupational Health Specialist	1/1/1900
0019	0001	Safety Technician	1/1/1900
0020	0001	Community Planner	1/1/1900
0023	0001	Outdoor Recreation Planner	1/1/1900
0028	0016	Deputy Assistant Secretary for Environment	1/1/1900
0028	0001	Deputy Assistant Secretary, Environment	1/1/1900
0028	0002	Deputy Director, Environment, Safety & Health Evaluations	1/1/1900
0028	0014	Dir, Ofc of National Environmental Policy Act (NEPA) Pol & Compli	1/1/1900
0028	0009	Director, Environmental Guidance	1/1/1900
0028	0003	Director, Environmental Policy & Assistance	1/1/1900
0028	0008	Director, NEPA Oversight	1/1/1900
0028	0004	Director, NEPA Policy & Assistance	1/1/1900
0028	0013	Director, Office of Environmental Policy & Guidance	1/1/1900
0028	0005	Environmental Protection Specialist	1/1/1900
0028	0011	Executive Assistant	1/1/1900
0028	0012	Lead Environmental Protection Specialist	1/1/1900
0028	0006	Principal Dep Asst Secretary, Environment, Safety & Health	1/1/1900
0028	0015	Special Assistant for Compliance	1/1/1900
0028	0007	Supervisory Environmental Protection Specialist	1/1/1900
0028	0010	WAG Manager	1/1/1900
0029	0003	Environmental Assistant	1/1/1900
0029	0002	Environmental Protection Assistant	1/1/1900
0029	0001	Environmental Technician	1/1/1900
0030	0830	Document Control Analyst (Leader)	1/1/1900
0800	0024	Chief, Personnel Security Branch	1/1/1900
0800	0025	Chief, Physical Security Branch	1/1/1900
0800	0039	Cyber Security Specialist	1/1/1900
0800	0029	Dep Assoc Dep Asst Sec Technical & Environmental Support	1/1/1900
0800	0064	Deputy Director	1/1/1900
0800	0048	Deputy Director, Office of Emergency Operations	1/1/1900

## **Generating A Vacant Position Report**

The Vacant Position report is a list of all Vacant Positions within your Sub-Agency. To generate this report:

#### Develop Workforce > Manage Positions (USF) > DOE Report > Vacant Position Report

- 1. Select Vacant Position Report.
- 2. Click on Add a New Value.
- 3. Run Control ID VACPSNRPT.
- 4. Click **Add** You will only have to use **Add a New Value** the first time you generate this report. Every time after you can use "VACPSNRPT."
- 5. Enter the **Sub-Agency** or **Sub-Agencies** for which you wish to generate the report. You can enter the two-digit code if you know it or click on the magnifying glass and select from list. To add more than one **Sub-Agency**, press (+) to add a row for the next **Sub-Agency**.
- 6. Enter **Department** or **Departments** for which you wish to generate report. You can enter the ten-digit code if you know it or click on the magnifying glass and select them from the list available. To add more than one **Department**, press (+) to add a row for the next **Department**. Follow this procedure until you have selected each **Department** you wish to report on. If you do not select a specific **Department** for the sub agency entered, then all **Departments** for that sub agency will print.
- 7. If you try to select a **Department** without entering a sub agency, the system will give you an error of "*No records found matching specified key(s)*." Therefore, you must enter or select a **Sub-Agency** or select a specific **Department**.
- 8. Click on Save.
- 9. Click on Run.
- 10. When the Process Scheduler Request screen appears, select Server Name: PSNT.
- 11. Verify under **Process List** that the **Type**: Web and **Format**: PDF.
- 12. Click OK.
- 13. Record the process instance number.
- 14. Click on **Report Manager** and scroll to the right side of the page and click on **Refresh** until you see <u>View</u> appear next to your report. Click on <u>View</u>.
- 15. Maximize the **Report/Log Viewer** page.
- 16. On the **Report/Log Viewer** page click on the report with the **.PDF** extension.
- 17. Adobe Acrobat will open and you should print your report from there.

Report ID: NRHR012

DEPARTMENT OF ENERGY Page No. 2

CHIO FIELD OFFICE Run Date: 12/04/2003 SUB-AGENCY: OH Run Time: 14:52:58

VACANT POSITIONS

LAST LAST POSITION

INCUMBENT INCUMBENT POSITION PAY OCC JOB POSITION FULL/ STATUS EMPLID NAME TITLE PLAN SERIESGRADE CODE NUMBER PART DATE

# Generating A Pay Plan EN WGI/Trial Period Report

The **EN WGI/Trial Period** report is used to print a listing of employees who were converted to pay plan "EN" within a particular date range. In order to generate this report:

Define Business Rules > Manage Human Resources (USF) > DOE Report > EN WGI/Trial Period Report

- 1. Click on "Add a New Value."
- 2. **Run Control ID** ENWGI/Trial.
- 3. Click **Add** You will only have to use **Add a New Value** the first time you generate this report. Every time after you can use "ENWGI/Trial."
- 4. Enter the **Start Date** for which you wish to generate the report. *Note: Date Range should include the date of hire or the date that the employee was converted to Pay Plan EN.*
- 5. Enter the **End Date** for which you wish to generate the report.
- 6. Click on **Save**.
- 7. Click on **Run**.
- 8. When the Process Scheduler Request screen appears, select **Server Name**: PSNT.
- 9. Verify under **Process List** that the **Type**: Web and **Format**: PDF.
- 10. Click **OK**.
- 11. Record the process instance number.
- 12. Click on **Report Manager** and scroll to the right side of the page and click on **Refresh** until you see **View** appear next to your report. Click on **View**.
- 13. Maximize the **Report/Log Viewer** page.
- 14. On the **Report/Log Viewer** page click on the report with the **.PDF** extension.
- 15. Adobe Acrobat will open.
- 16. Click on the printer icon and make adjustments to your report so it prints properly. These adjustments may include selecting "Portrait" or "Landscape" orientation or selecting "Shrink oversized pages to paper size."
- 17. Once the report appears in the print preview display as you want to see it printed, click OK to send it to the printer.

Report ID: NRHR058

U.S. DEPARTMENT OF ENERGY
EN PAY PLAN WGI/TRIAL PERIOD REPORT

From 01-JAN-2002 Thru 10-NOV-2003

Page No. 1

Run Date: 11/17/2003

Run Time: 12:58:23

From 01-JAN-2002 Thru 10-NOV-2003

SUB-AGENCY:XE National Nuclear Security Administration

NOA - R E A S O N	PAY EMPLID NAME PLN Comprate Adj Total
570 Com to Bus 2005	
570 Conv to Exc Appt	
570 Conv to Exc Appt	
570 Conv to Exc Appt	
	570 Conv to Exc Appt 570 Conv to Exc Appt 570 Conv to Exc Appt 570 Conv to Exc Appt

TOTAL Employees FOR SUB-AGENCY

End of Report

#### 10.2 Ticklers & Notices

Corporate queries will provide ticklers and employee/supervisor notices.

## **Generating Notices in CHRIS**

The public queries will only return records for agencies to which you have access based on departmental security, and are sorted by Sub-Agency and DeptID.

- Log into CHRIS using your Site Query ID. Navigate to PeopleTools > Query Manager > Use > Query Manager.
- 2. Type No (for "Notices") in the third box to the right of Search by: and click on the Search button.
- 3. Scroll to the desired query and click on **Run**.
- 4. Enter the appropriate **Notices for PP Start Date** at the prompt.
  - **NOTE**: The notices should be run one time during each pay period. It is recommended you run the WGI notice no earlier than the day after payroll calc to get the correct LWOP/Nonpay hours.
- 5. Enter POI or Subagency.
- 6. Click on View Results.
- 7. Click on **Download results in:** Excel Spreadsheet.
  - **<u>NOTE</u>**: No matching values will display if there are no records meeting the specified criteria for the pay period.
- 8. Review the spreadsheet. *Delete rows one and two containing the query title. DO NOT* delete or change any of the column names/headings found in row three. The Word templates use the column names to populate the notice forms.
- 9. Delete rows for which you do not want to generate a notice. (For example, the WGI Certification query is based on the populated WGI Due date only and reports TOTAL nonpay LWOP hours. It does not consider excess LWOP hours for which you would adjust the WGI Due date.)
- 10. Save the spreadsheet (File\Save As) as follows: Save In: C:\REPORTS
  - **File Name:** Name the worksheet using the naming convention in the table below corresponding to the notice you are trying to generate.
  - **NOTE:** You will have to overwrite this file each pay period.
  - Save As Type: Microsoft Excel 4.0 Worksheet.
  - Click on the **SAVE** button. (Excel may ask if you want to replace the existing file. Click on **yes**.)
- 11. Minimize Microsoft Excel.

CHRIS Notices Summary of Naming conventions					
Open & Run Standard Public Query:	Save completed Spreadsheet as a Worksheet named:	Open MS Word and open the matching Template doc below:			
Notice_InitialProb_Trial_4mo Notice_InitialProb_Trial_Fnl	C:\Reports\Prob4M.xls C:\Reports\ProbFnl.xls	*CHRISWRD\Prob4M.doc *CHRISWRD\ProbFnl.doc			
Notice_SES_Probation_4mo Notice_SES_Probation_Fnl	C:\Reports\SES4M.xls C:\Reports\SESFnl.xls	*CHRISWRD\SES4M.doc *CHRISWRD\SESFnl.doc			
Notice_Supv_Mgr_Prob_4mo Notice_Supv_Mgr_Prob_Fnl	C:\Reports\Supv4M.xls C:\Reports\SupvFnl.xls	*CHRISWRD\Supv4M.doc *CHRISWRD\SupvFnl.doc			
Notice_WGI_Certification	C:\Reports\WGIDue.xls	*CHRISWRD\WGIDue.doc			

\*CHRISWRD: This is the location recommended for storing the Word template documents. For confirmation of this, contact you HRPOC who should have received this information from your site's IMPOC.

# Merging Notice Spreadsheets with Letter Templates in Microsoft Word

Open Microsoft Word and follow the steps below:

- 1. Open the appropriate form file in the \*CHRISWRD Word directory. (This may be on your local PC or on your network -- check with your IMPOC if you do not know the path.) *Refer to the table above for a list of the queries and matching templates.*
- 2. From the menu, select Tools/Mail Merge:
- 3. Leave the Main Document as defaulted (to the file you have open).
- 4. Leave the Data Source as defaulted if you have followed the naming conventions stated above for the Excel Worksheet. (Otherwise, click on Get Data, select Open Data Source, and locate the appropriate worksheet wherever you saved it.)
- 5. Click on the Merge Button.
- 6. Click on the Merge button on the next popup screen.
- 7. When the merge is complete, review the output and save the merged document.
- 8. Print the notices. *DO NOT* use double-sided printing.
- 9. Close the merged document. This still leaves the original merge template open.
- 10. When you try to close the merge form, Word will ask if you want to save the changes you made. Click on No. <u>NoTE</u>: If desired, you can save the Word template under another name, delete the merge fields, then type the data directly into the Word template to send out an individual notice.

# **Tickler Queries**

The public queries will only return records for agencies to which you have access based on departmental security, and are sorted by Sub-Agency and DeptID.

- 1. Log into CHRIS using your Site Query ID. Navigate to **PeopleTools > Query Manager > Use > Query Manager**.
- 2. Type **Tick** (for "Ticklers") in the third box to the right of **Search by:** and click on the **Search** button. The third column in the pick list shows whether the query is Private or Public. Private queries are listed first. (You will only see the private queries created by your site's query ID.)
- 3. Scroll to the desired query and click on **Run**.
- 4. Enter the appropriate date at the Prompt (see table below).
- 5. Click POI or Subagency.
- 6. Click on View Results.
- 7. Click on Download results in: an Excel Spreadsheet.

**NOTE:** No matching values will display if there are no records meeting the specified criteria for the pay period.

- 8. Review the spreadsheet.
  - **REMINDER:** The WGI Due Tickler query is based on the populated WGI Due date only and reports Total non-pay LWOP. It does not consider excess LWOP hours for which you would adjust the WGI Due date.
- 9. Format spreadsheet as desired.
  - **NOTE:** Legal paper (8.5 X 14) is recommended.
- 10. Save (File\Save As) and Print the worksheet.

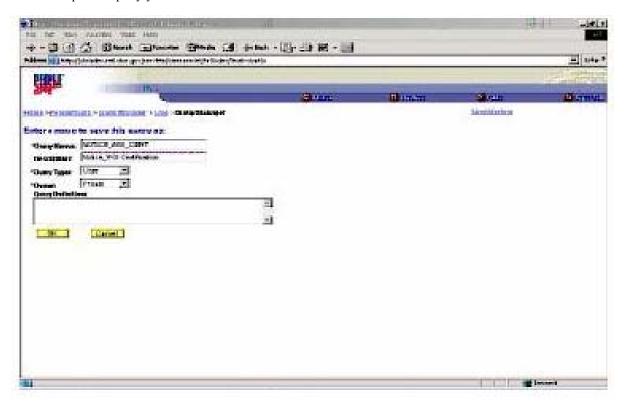
Tickler Queries					
Query	Date Prompt	Returns			
Tick_AppointmentExpires	1st Day of Pay Period	All that expire Before and Within that PP			
Tick_InitialProbTrialPeriodExp	1st Day of Pay Period	All that expire Within that PP			
Tick_LWOP_Expires	1st Day of Next Pay Period	All that expire <b>Before</b> that PP			
Tick_SES_Probation_Exp	1st Day of Pay Period	All that expire Within that PP			
Tick_Supv_Mgr_Probation_Exp	1st Day of Pay Period	All that expire Within that PP			
Tick_TempPromotionExpires	1st Day of Next Pay Period	All that expire <b>Before</b> that PP			
Tick_Tenure_Action	Next Pay Period Start Date	All that may be eligible within 60 days			
Tick_WGI_Due	1st Day of Next Pay Period	All that fall due <b>Before</b> that PP			
Tick_Worker_Trainee_Appts	Next Pay Period Start Date	All that fall due <b>Before</b> that PP			

## **Modifying a Public Query**

**<u>NOTE</u>**: If you modify a standard public query to meet site-specific needs, remember to use your private modified query in the future when following the instructions in this document for running and merging the associated public query. (You do not have to modify the queries.)

To modify a public query to run notices only for a specific Sub-Agency, please follow the steps below:

- 1. Log into **CHRIS** using your site's query ID and password. The site query ID automatically launches the Home Menu Screen.
- 2. Navigate to Query Manager by clicking on **PeopleTools > Query Manager > Use > Query Manager**.
- Open the public query you want to modify, for example, type:
   Notice\_WGI\_Certification in the third box to the right of Search by: and click on the Search button.
   NOTE: The third column in the picklist shows the type of query, Public or Private. (You will only see the private queries created by your site's query ID.)
- 4. Click on Query Name (*Notice\_WGI\_Certification*) to open the selected query. *NOTE*: The Query Screen will default to the **Fields Tab**.
- 5. Scroll down and click on **Save As** to rename the query. Change the **Query Name**, verify that **Owner** is set to **Private**, and then click **OK** to accept.
- 6. Make your modifications. (See the example below.)
- 7. Once this is saved, follow the instructions for running the original public query, but use the new private query you created.

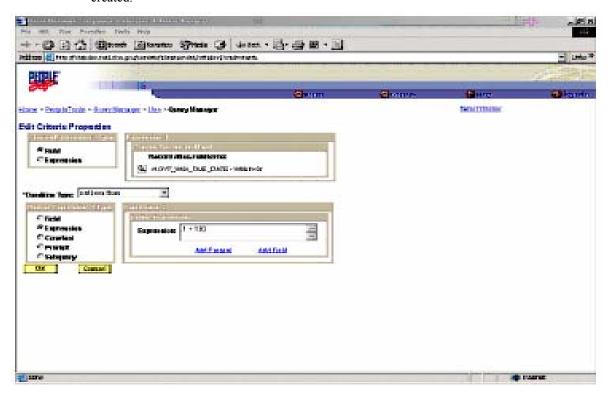


#### Example 1

Your site has three Sub-Agencies (ex. AB, BC, and CD), and you want to modify the Notice\_WGI\_Certfication query so that you can run it separately for each Sub-Agency.

- 1. Open the Public Query Notice WGI Certification.
- 2. **NOTE:** If needed, refer to the instructions above for opening a query.
- 3. Click **Save As** to save and rename the file as **Notice\_WGI\_Certification\_AB**. Verify that **Owner** is set to **Private**.
- 4. Click OK.
- 5. Modify the query:
  - a. Click on the **Fields** tab, locate field **A.GVT\_SUB\_AGENCY** and click on the corresponding **gray funnel icon with a plus sign**.

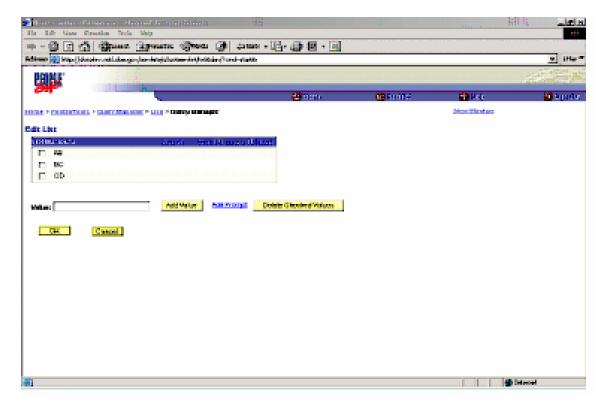
    This opens the **Edit Criteria Properties** page which allows new criteria to be added to the query.
  - b. Select **equal to** from the **Condition Type** drop-down list.
    - **NOTE:** Equal to may already be selected.
  - c. Click the Constant radio button under the Choose Expression 2 Type group box.
     <u>NOTE</u>: Constant may already be selected.
  - d. Type **AB** in the **Constant** text box under the **Define Constant** group box.
  - e. Click **OK** to accept changes.
  - f. Click the **Save** button to save your modifications.
  - g. Follow the instructions for running the original public query, but use the new private query you created.



#### Example 2

Your site has five Sub-Agencies (ex. AB, BC, CD, DE, and EF), and you want to modify the **Notice\_WGI\_Certification** query so that you can run it separately for one group of Sub-Agencies (AB, BC, and CD). Follow the steps above to rename the public query as **Notice\_WGI\_AB\_BD\_CD**, again verifying that **Owner** is set to **Private**.

- a. Click on the Fields tab, locate field A.GVT\_SUB\_AGENCY and click on the corresponding gray funnel icon with a plus sign.
   This opens the Edit Criteria Properties page which allows new criteria to be added to the query.
- b. Select in list from the Condition Type drop-down list.
- c. Click the magnifying glass for List Members in the Expression 2 group box.
- d. Type **AB** in the **Value** text box and click on **Add Value** button.
- e. Repeat the previous step for Sub-Agencies **BC** and **CD**.
- f. When all of the Sub-Agencies appear as List Members, click OK.
- g. Click OK again on the Edit Criteria Properties page.
- h. Click the Save button to save your modifications.
- i. Follow the instructions for running the original public query, but use the new private query you created.



# 11 Automatic Processes

#### Contents

**⇒** Automatic WGI

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#### 11.1 Automatic WGI

# **Processing Automatic and Manual Within-Grade Increases**(WGI's)

Automatic WGI's are processed the second Monday of each pay period. This cycle has been established to allow LWOP hours for the previous pay period to be posted in CHRIS on the first Friday of each pay period. However, some WGI's will still have to be processed manually.

- Employee has LWOP during the waiting period;
- Employee does not have a valid (or current) performance rating during the last 24 months;
- Performance rating is not fully successful or satisfactory (level 2 or below);
- REQ/INI action is pending;
- Future dated PRO action was processed effective on or after the effective date of the WGI.

It is imperative for HR Offices to maintain updated performance appraisal information in CHRIS. The automated program verifies if an employee has an acceptable (or pass) appraisal within the past 24 months in CHRIS. If so, the WGI action will be automatically updated in CHRIS in the pay period that it is effective. If the employee's latest performance appraisal (ending date) is greater than 24 months, NO WGI WILL BE PROCESSED AUTOMATICALLY. In this case, the CHRIS user will need to manually key the WGI action in CHRIS which will adversely affect the time and labor savings the automated program will provide.

#### NOTE:

If you are processing a promotion (or a conversion that results in a higher grade for the employee), you are reminded to wait until the second week of the pay period to process the action. Since the WGI could impact pay on the promotion or conversion, these actions should not be entered in CHRIS until after automatic WGIs have been processed the second Monday of the pay period.

The following procedures are recommended for WGI processing:

At the **beginning** of **each** pay period:

- Run WGI Tickler Report (Tick\_WGI Due) for the current pay period.
  - Verify that all acceptable level of competence certifications have been received from supervisors for WGI's due during current pay period.
  - Verify that all employees have a performance rating in CHRIS dated within the last 24 months and enter missing ratings, as appropriate.
  - Process NOA Code 888-WGI Denial, as appropriate.

- Re-calculate new WGI Due Dates, as appropriate, for employees with excess LWOP, process NOA
  Code 966 to correct the WGI due date and set WGI Override to Manual, and enter new WGI Due
  Date.
- Generate WGI Notices/Certifications (Notice\_WGI Certification) for WGI's due 120 days henceforth and forward these notices to supervisors for certification of acceptable level of competence.

#### Beginning on the **second Monday** of **each** pay period:

- Run the following queries:
  - N\_WGI\_Processed This report will list employees who received WGI's for the current pay period through the automatic WGI process. You will be prompted to enter the pay period beginning date when you run this query.
  - **N\_WGI\_Due\_Failed** This report will list employees eligible for WGI's but not processed in the automatic WGI cycle for the current pay period. You will be prompted to enter the pay period beginning date when you run this query.
  - N\_WGI\_Past\_Due This report will list any employee who, according to their WGI Due Date, was due for a WGI prior to the current pay period but the WGI has not been processed.
- Review the above reports and process manual WGI's, as appropriate.
- Print and distribute SF-50's for WGI's processed during the pay period. Use mass printing capabilities to print these SF-50's.

# 12 Mass Processes

#### **Contents**

- **⇒** Awards
- ⇒ Organization Title Changes (NOA Code 929)/Realignments (NOA Code 790)
- **⇔** Mass Printing
- **⇔** Mass Ratings
- **⇒** Mass Ratings With Awards
- **⇒** Mass Cleanup "Reports To"

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#### 12.1 Awards

## Requesting/Processing Mass Awards Actions In CHRIS

Mass award actions for cash, time off, suggestion, SES, and travel incentive award actions can be processed in CHRIS by submitting a specially formatted Excel spreadsheet with the award amounts. This process should be used when more than 15 employees are receiving the award. The capability to initiate a group award for up to 15 employees exists in the Workflow. This process should not be used for mass processing of performance awards in conjunction with Performance Rating (see Section 11.6). Follow the steps below to request/submit mass awards for processing in CHRIS. Lead time is needed to process these awards; therefore, the CHRIS Functional Team needs to receive the spreadsheets 2-3 days before the Friday before the effective date of the award. Otherwise, the action may be delayed a pay period.

**Step 1:** Logon on to CHRIS using your site's query ID and password.

#### Step 2: Path: Home > PeopleTools > Query Manager > Use > Query Manager

Type N\_MASS in the 'Search For' field and click on the Search button to generate a list of mass action queries. In the resulting query list, click on the 'Run' hyperlink for N\_MASS\_AWARD\_CANDIDATES to generate a list of your employees.

**Step 3:** Click on the hyperlink for 'Download results in: an Excel Spreadsheet' to run the report to EXCEL. On the File Download page, select "Open this file from its current location" and click on OK. If you see an 'Open With' window, choose MicroSoft Excel as the program you want to use. The following data fields will be included in the EXCEL report: POI, SA, Emplid, NID, Name Acct Code, Deptid, Pay Plan, Grade, Step, Base Pay, Wrk Sched, Hire Date, Last Promo Date, Perf Rating, Review Date, Awd Amt, Awd Hrs, and Manager Level.

**Step 4:** Save the report using a file name that you choose. <u>Note</u>: If any of the award parameters listed in step 5 below are different you will need to save this EXCEL report under additional file names to accommodate the different mass award runs. A separate EXCEL file will need to be provided to the <u>CHRISFunctional@netl.doe.gov</u> for each mass awards run.

**Step 5:** The spreadsheet may be used for award calculations. However, please heed the following warnings:

Whether you are processing cash, suggestions, SES, travel incentives, or time off awards for a group of 15 employees or 150 employees, you can generate the specially-formatted spreadsheet from CHRIS and enter the award amounts. You must use separate spreadsheets if the NOA Code/Action Reason or Effective Date are different for the group of employees. If a spreadsheet lists both cash and time-off awards, and all time-off awards have the same NOA Code/Action Reason and effective date and all of cash awards have the same NOA Code/Action Reason and effective date, the awards can be processed on the same spreadsheet. Example: The Action Reason is TOP, the NOA Code is 846, and the effective date is 02-11-02 for all time-off awards; and the Action Reason is PCA, the NOA Code is 840, and the effective date is 02-11-02 for all cash awards.

When you are finished, submit the spreadsheet along with the other required information (such as: effective date, NOA Code, action reason, etc.) to the CHRIS Functional Hotline at <a href="CHRISFunctional@netl.doe.gov">CHRISFunctional@netl.doe.gov</a> for automatic processing in CHRIS. You will be notified when the actions have been processed so that you can run the mass print program to generate the SF-50 personnel actions.

#### **WARNINGS:**

- COLUMNS "A" THROUGH "R" MUST NOT BE ALTERED.
- IF AWARD CALCULATIONS ARE PERFORMED IN THIS EXCEL FILE, COLUMNS "S" THROUGH "IV" MUST BE USED FOR THESE CALCULATIONS.
- THE ACTUAL AWARD <u>AMOUNT</u> (NOT FORMULA) MUST BE ENTERED OR PASTED IN COLUMN "Q" FOR AWARD NOA CODES 840, 841, 842, 843, 845, 878, AND 879.
- THE ACTUAL AWARD <u>HOURS</u> (NOT FORMULA) MUST BE ENTERED OR PASTED IN COLUMN "R" FOR NOA CODES 846 AND 847.
- ANY NEW COLUMNS ADDED FOR CALCULATIONS MUST BE REMOVED FROM THE SPREADSHEET BEFORE IT IS FORWARDED TO THE CHRIS FUNCTIONAL STAFF FOR MASS AWARDS PROCESSING.

Step 6: For NOA Codes 840, 841, 842, 843, 845, 878, or 879 enter the Awd Amt in column "Q"; for NOA Codes 846 and 847 enter the Awd Hrs in column "R".

**Step 7:** Remove any columns used for award calculations and save the spreadsheet.

**Step 8:** Send the EXCEL file(s) by e-mail to <a href="mailto:CHRISFunctional@netl.doe.gov">CHRISFunctional@netl.doe.gov</a> and include in the e-mail the following parameters for each run:

#### **Award Parameters:**

Effective Date
Action Date
Action Reason
NOA Code
Legal Authority (For NOA Code 878 actions only)

This information should be provided to the CHRIS staff as soon as the spreadsheet is completed and the effective date is established. These mass actions should be processed during the pay period in which they are effective. At this time, a separate spreadsheet will be needed if the NOA Code/Action Reason and/or Effective Date are different for the group of employees.

**Step 9:** Once the mass awards run(s) are completed, the CHRIS staff will provide reports of the mass awards completed as well as any awards that will need to be processed manually.

**Step 10:** Using the mass printing capability generate the necessary copies of the SF-50's.

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# 12.2 Organization Title Changes (NOA Code 929)/ Realignments (NOA Code 790)

# Generating A Crosswalk Query for Use in Requesting Mass Organization Name Changes or NOA Code 790 Realignment Action

Once the CHRIS Functional Staff is notified by Tom Wheeler of an approved reorganization you will be notified via e-mail to generate a crosswalk of changes for use in processing mass actions.

The e-mail will include a copy of the approval memo from Tom Wheeler, and a request for necessary information to prepare for the requested changes. Within the e-mail we will ask for verification of the effective date proposed by T. Wheeler, and what verbage will be used for the required UNM on mass realignment (NOA Code 790) actions. Upon receipt of this e-mail, it is very important that you develop a crosswalk of all employees affected by the change.

Using your Query Site ID, run the query **N\_MassPOIChg\_MassReorg\_Request**. The query will prompt you for a full or partial Department ID.

- If the reorganization affects all departments within your subagency or several departments that are distinguishable by the first few digits of the department ID, you can enter a partial department ID such as 726%. This would generate a report with all departments that start with 726.
- If the reorganization affects only one department within your subagency you can enter the complete Department ID, or as many characters as are required to distinguish it from all other department IDs. This will generate a report of only the department requested.

The query will include the following criteria: Department ID, Department, Name, Position Number, Jobcode, and Emplid.

When the need arises for use of this report, it is important that you <u>do not</u> delete or remove any employees from the report. In order for the CHRIS Staff to process the mass actions, you will need <u>only</u> to add an additional column at the end of the spreadsheet labeled **New Department**. For each employee listed, enter one of the following in the New Department column: No Change, Reassignment (this means that you will be processing a manual action to reassign this employee as part of the reorganization), or the **new** department id to which the employee is being realigned. If the reorganization involves a change in department name, enter "929" in the New Department column.

# 12.3 Mass Printing

The following menu paths will be used to access and complete the mass print pages:

#### For SF-50

Administer Workforce/Administer Workforce/DOE Report/Notice of Personnel Action\*

#### For SF-52

#### Administer Workforce/Administer Workforce/DOE Report/Request for Personnel Action\*

\* Each user will need to add a separate Run Control for the SF-50 and SF-52. We recommend that you name the SF-50 Run Control as "SF50" and the SF-52 Run Control as "SF52." Click on the Add a New Value hyperlink the first time you use each of these mass reports. Once you have added a Run Control for both SF-50 and SF-52, you will be able to reuse the Run Controls each time you mass print SF-50/SF-52.

#### **Examples of When to Mass Print Actions**

If a court order or EEO settlement case requires the processing of several personnel actions (e.g., new actions or corrections) for an employee, rather than printing the SF-50 immediately after you key each action, run the mass print program to generate all the SF-50s by EmpID and by the range of effective dates. Mass printing all of the actions when you have finished performing the data entry is faster and will save time.

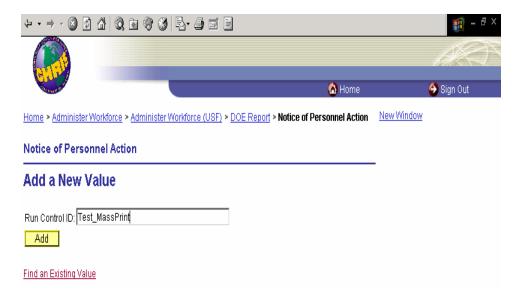
If you are entering several different types of actions in CHRIS at one time, such as retirements or resignations effective 12/29/00 and 12/30/00, run the mass SF-50 print program immediately after you have finished entering these actions rather than printing them one at a time. You can define your mass print request to select a specific NOA code and a specific effective date or date range.

#### **Detailed Instructions for Setting Up a Mass Print Run Control**

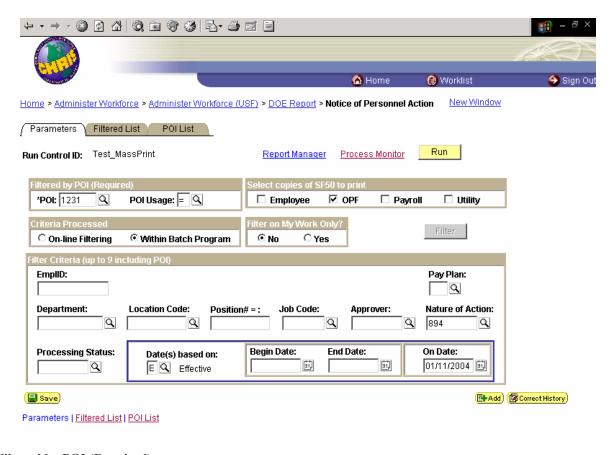
1. Navigate to Home > Administer Workforce > Administer Workforce (USF) > DOE Report > Notice of Personnel Action. Select Add a New Value.



2. Enter a Run Control ID (such as "SF50" or "MASSPRINT"):



3. Complete the Parameters page above.



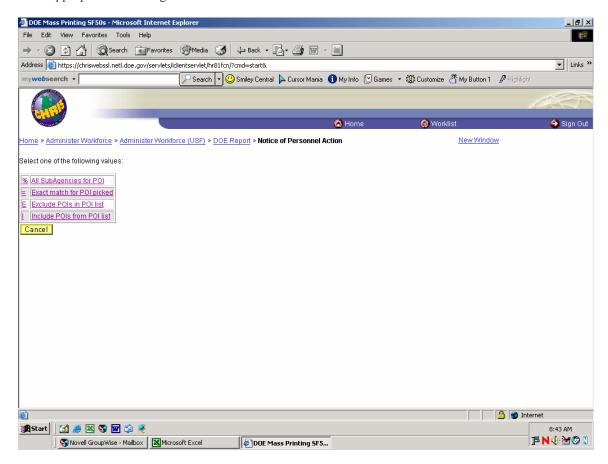
#### Filtered by POI (Required)

#### **POI**

Enter the POI for which you want to print actions.

#### **POI Usage Field**

Select the appropriate POI Usage:



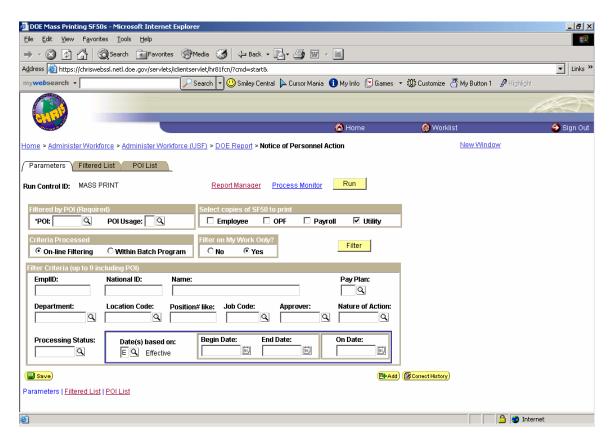
If POI Usage field is left blank, actions will print for all sub-agencies for the POI selected. (Ex: If you enter POI 4162, actions for both 4162 and 4162A will print.)

- %- is the same as leaving the POI Usage field blank, in other words, all sub-agencies will print.
- will print only the actions for the sub-agency selected in the POI field. (Ex: If you enter POI 4162 and select = for the POI Usage field, 4162 actions will print, but not 4162A.)
- E not available to users.
- I not available to users.

#### **Select Copies of SF-50's to Print**

You can select all four copies (Employee, OPF, Payroll, Utility) to print together as a set for each action or you can select a specific copy to print for each action (e.g., Employee copy only). If your printer has duplex printing capabilities, it is recommended that you print the Employee copy of the SF-50 using the instructions for duplex printing. Then depending on user preference, the OPF Payroll and Utility copies can be printed together or separately using the instructions for single-side printing. Additionally, if you are printing your annual general schedule increases, for example, it is recommend that you go through the mass print process four times, first

printing the Employee copies, then the OPF copies, etc. This will eliminate the need to manually sort each set for distribution.



#### Criteria Processed

#### **On-Line Filtering**

This option gives you the opportunity to preview which 50's or 52's that will print and to select all or part of the list provided. In order to define criteria, select an "On Date" or a "Begin Date" and "End Date" and click on the "Filter" button. Proceed to Step #4 for information on completing the Filtered List Page.

#### Within Batch Program

This option will print every record that meets the criteria you have established on the above page. In selecting this option, you will not have the opportunity to further define filter criteria on the Filtered List page. This option will generally be used to print large quantities of actions having the same NOA code (e.g., annual pay increases, mass awards, etc.).

#### Filter On My Work Only

Choose "Yes" if you only want to print records where you are the last one to update the record. Note that if you have created the REQ record, but the action has since been changed to PRO by another user, that action will not be included. Only the records where you were the last person to update the record will be printed, if you choose "Yes."

#### Filter Criteria (Up to 9 Including POI)

Note: If you chose **On-Line Filtering** above, National ID and Name fields will be available. If you chose **Within Batch Program** above, National ID and Name fields will <u>not</u> be available.

Carefully select filter criteria from the list below for the actions you want to print. Enter data only in required fields and those fields that define your print request. Leave all other fields blank.

- **Emplid**: Enter the employee's Emplid if you want to identify actions to print for a specific employee.
- **National ID/Name**: Enter the employee's Social Security number or Name if you want to identify actions to print for a specific employee.
- **Pay Plan**: Enter appropriate Pay Plan or select Pay Plan from the drop down box if you want to print actions for a specific Pay Plan.
- **Department**: Enter a specific Department ID or a partial Department ID. Use the partial Department ID only if you want to print SF-50's for a broad range of departments within your sub-agency. Be very careful when using this wildcard option as you may print more SF-50's than you need.
- **Location Code**: Enter a specific Location Code or a partial Location Code. Use the partial Location only if you want to print SF-50's for a broad range of locations. Be very careful when using this wildcard option as you may print more SF-50's than you need.
- **Position** #: For Online Filtering: When this option is selected, you can use this feature if you want to print actions for specific Position Numbers. When the position number or numbers are unknown, you may enter a partial string of numbers. This will provide a results list that includes all employee records with positions that start with the string. You can then select from this results list which ones to print.

For Within Batch Program: When this option is selected, records are printed only if they exactly match the string entered.

- **Job Code**: Enter the appropriate Job Code or select the Job Code from the drop down box if you want to print actions for a specific Job Code.
- **Approver**: Enter the appropriate Approving Official's ID or select the Approving Official's ID from the drop down box if you want to print actions that were approved by a specific Approving Official.
- **Nature of Action Code**: Enter the NOA Code or select the appropriate NOA code from the drop down box if you want to print actions for a specific NOA Code.
- **Processing Status**: Usually this criteria will be left blank. However, you can specify that you want to print only actions with a specific WIP Status ("PRO," "COR," or "CAN").
- **Dates Based On**: You can select actions based on 'E' for Effective Date; 'P' for Processed Date; or 'A' for Approval Date. The default is 'E' for Effective Date.
  - **Effective Date**: This date option is for printing all actions effective on the date specified. Click on the "Filter" button to navigate to the Filtered List page.

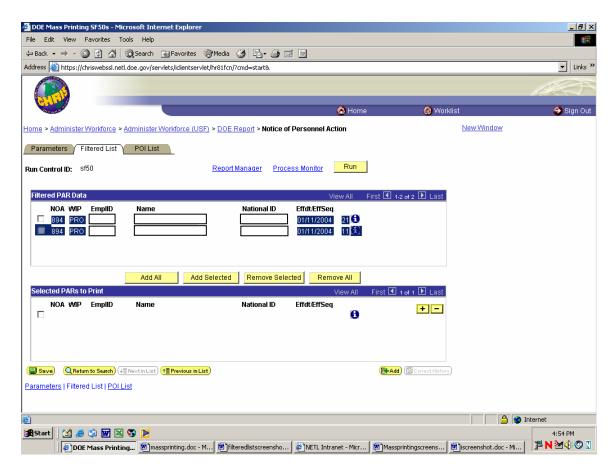
- **Processed Date**: This date refers to the date the action was created or last updated. Records will be printed if either the original creation date or the last update date meet the specified date criteria.
- Approved Date: This date option is for printing all actions that were approved on the date specified.
- Begin Date: This is a required field if using a date range.
- End Date: This is a required field if using a date range. If you are using a date range, the criteria will select every action (meeting the other criteria you have selected) with an "Effective Date," "Processed Date," or "Approved Date" (per your selection) on the Begin Date, on the End Date, or between these two dates.
- On Date: This is a required field if you do not choose a date range. The "On Date" reflects the date of the
  actions that you want to print based on the date option selected above (i.e., Effective Date, Processed Date, or
  Approved Date).

You must use either a date range ("Begin Date" and "End Date") or an "On Date"--you may not use both.

#### **Filter Button:**

This button only applies if you chose **On-Line Filtering** as Criteria Processed. If you chose **Within Batch Program** as Criteria Processed, this button will be grayed out and you should proceed to the last step.

If you chose **On-Line Filtering**, click on the "Filter button" to navigate to the Filtered List page.



#### 4. Filtered List Page

#### **Filtered PAR Data**

The records meeting the criteria on the Parameters page are displayed in the upper half (Filtered PAR Data) of the Filtered List page. If you are using the On-Line print option in conjunction with the Filter button, the only actions that will be included in your print job will be those that ultimately get added to the lower section (Selected PAR's to Print) of the above page.

The first two buttons 'Add All' and 'Add Selected' on this page apply to copying records from the filtered PAR Data to the Selected PAR's to Print section of the page.

Add All – Takes every record displayed in the Filter PAR Data and adds it to the Selected PAR's to Print.

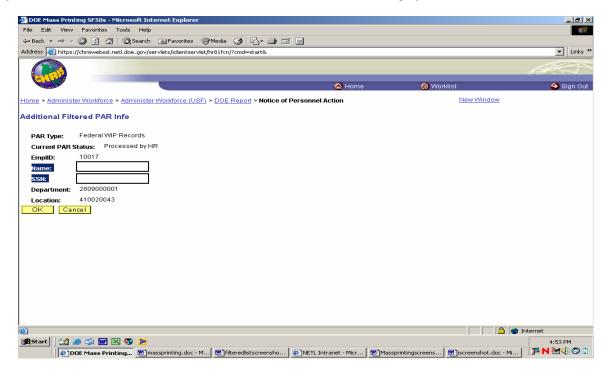
Add Selected – Adds any records from the Filtered PAR Data that are checked in the Selected PARs to Print list.

The last two buttons "Remove Selected" and "Remove All" on this page apply to removing selected records from the Selected PAR's to Print section of the page.

Remove Selected – Will remove all records that are checked from the Selected PARs to Print list.

**Remove All** – Will clear all records from the Selected PARs to Print.

If you click on the information or "i" button, additional information will display for the action.



#### **Selected PARs to Print**

After you have used the "Add All," "Add Selected," "Remove Selected," "Remove All" to finalize your list of actions you want to print, those actions will be listed in this section.

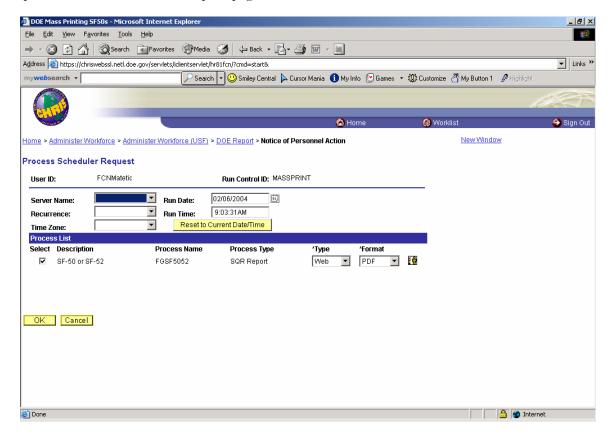
#### 5. Last Step

Once you have completed data on the Parameters page (and the Filtered List page, if appropriate) and you are satisfied that you have identified the SF-50's that you want to print, complete the following steps to run your print job:

Click on "Save."

Click on the RUN button (top right corner).

Complete the Process Scheduler Request page as follows:

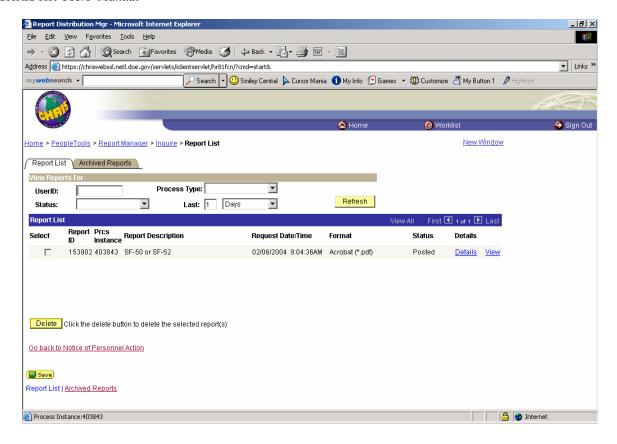


- Server Name: PSNT.

Type: Web.Format: PDF.

Click "OK" to submit the print job.

Click on "Report Manager" to navigate to the Report List page.



Click on "Refresh" every 3 to 5 seconds until Status displays as "Posted."

Click on View to open the Report/Log Viewer page.

Click on the PDF file to open report in Adobe Acrobat.

Click on the printer icon to print report.

Follow instructions for duplex or single-side printing.

<u>Duplex Printing</u> (to print the Notice to Employee on the reverse side of Employee copy of the SF-50):

Select Properties from the Adobe Acrobat print page.

Click on More Options in the lower left corner of the Paper tab. Clicking on Properties may display a Page Setup tab on some machines.

Click on Flip on Long Edge or Long Side.

Click OK to exit More Options page or Page Setup tab.

Click Apply to save change (this step is not required if exiting Page Setup).

Click OK to exit Properties page (this step is not required if exiting Page Setup).

Click OK and the form will be sent to the printer.

The Employee copy of the SF-50 should print on the front side of the page, and the Notice to Employee should print on the reverse side of the page.

Single-Side Printing for Duplex Printers (use to print the OPF, Payroll, and Utility copies of the SF-50):

Click on the printer icon.

Select Properties from the Adobe Acrobat print page.

Click on More Options in the lower left corner of the Paper tab. Clicking on Properties may display a Page Setup tab on some machines.

Click on None.

Click OK to exit More Options page or Page Setup tab.

Click Apply to save change (this step is not required if exiting Page Setup).

Click OK to exit Properties page (this step is not required if exiting Page Setup).

Click OK.

Single-Side Printing (use to print any copies of the SF-50 if printer does not perform duplex):

Click on the printer icon of the Adobe Acrobat tool bar and a Print display will appear. Uncheck all boxes under the Copies and Adjustments area so that the forms print properly. Click OK and the form will be sent to the printer.

Reminder: If you are printing/distributing the Employee Copy of the SF-50 (Copy 1), the employee must be provided the Notice to Employee information that customarily prints on the reverse side of the SF-50.

#### INSTRUCTIONS FOR COMPLETING MASS PRINT PAGES FOR SF-52'S:

On the rare occasion that you need to mass print SF-52's, use the same procedures outlined above for SF-50's. However, you will note that the "Copies Requested" section on the Parameters page will be grayed out since multiple copies of the SF-52 are unnecessary.

# 12.4 Mass Ratings

# REQUESTING/PROCESSING MASS PERFORMANCE RATING UPDATES

Performance ratings for groups of more than 15 employees can be processed in mass by submitting a specially formatted Excel spreadsheet with required information to the CHRIS Functional Hotline. HR Offices must follow the steps below to request/submit mass processing.

#### **Requesting Mass Performance Ratings (Without Awards)**

- **Step 1:** Logon on to CHRIS using your site's query ID and password.
- Step 2: Path: PeopleTools > Query Manager > Use > Query Manager. Type N\_Mass in the "Search For" field and click on the Search button to generate a list of mass action queries. In the resulting query list, click on the "Run" hyperlink for N\_MASS\_APPRAISAL\_CANDIDATES to generate a list of your employees.
- **Step 3:** Click on the hyperlink for 'Download results in : <u>an Excel Spreadsheet</u>' to run the report to EXCEL. On the File Download page, select "Open this file from its current location" and click on OK. If you see an 'Open With' window, choose MicroSoft Excel as the program you want to use.
- **Step 4:** You will receive a prompt box to enter:
  - ReviewDate
  - ReviewFrom
  - ReviewTo

If you enter these dates the corresponding columns will populate on the spreadsheet. You may choose to leave one or more of these date columns blank. If these dates are not entered in the prompt box, the spreadsheet will generate without information in these columns.

The following data fields will be included in the EXCEL report: POI, SA, Emplid, NID, Name, Deptid, Pay Plan, Old Rvw Date, New Rvw Date, Review From, Review To, Rating Pattern, and Perf Rating.

- Step 5: The spreadsheet will contain the most recent performance information from CHRIS in the Rating Pattern and Perf Rating columns. The new rating information must be reflected in these columns when your spreadsheet is sent to the CHRIS staff for processing. If your office uses Pattern "A" (pass/fail), and your pattern has not changed during the period, very few changes will need to be made to these columns. If your office uses other than a Pattern of "A" (pass/fail), you should clear the Perf Rating column (except the column header) immediately to ensure that the old level is not confused as the new level.
- Step 6: Complete/revise the following columns before sending your spreadsheet(s) to the CHRIS staff for processing. If you need to make changes to the performance date columns referenced below, these columns must be reformatted in "Text" format before changes are made. Highlight the columns. From the EXCEL menu select: Format/Cells/Number Tab/Text.

New Rvw Date: Enter the new Date (Format: YYYY-MM-DD)

**Review From**: Enter the beginning date of the period (Format: YYYY-MM-DD) **Review To**: Enter the ending date of the period (Format: YYYY-MM-DD)

**Rating Pattern**: Be sure this column contains the pattern for the new ratings being processed. **Perf Rating**: Be sure this column reflects the employee's new Performance Rating.

- **Step 7:** Save the report using a file name that you choose.
- **Step 8:** Send the EXCEL file(s) by e-mail to <a href="mailto:CHRISFunctional@netl.doe.gov">CHRISFunctional@netl.doe.gov</a>.
- **Step 9:** Once mass processing has been completed, the CHRIS staff will provide a report of ratings completed as well as any that will need to be processed manually.
- **Step 10:** As always, if you have any questions or if the CHRIS staff can be of assistance, please do not hesitate to call the CHRIS Functional Hotline on (304) 285-1310.

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# 12.5 Mass Ratings With Awards

# REQUESTING/PROCESSING MASS PERFORMANCE RATING UPDATES WITH AWARDS

Performance ratings with award actions can be processed in mass for groups of more than 15 employees by submitting a specially formatted Excel spreadsheet with required information to the CHRIS Functional Hotline. HR Offices must follow the steps below to request/submit mass processing. Lead time is needed to process these awards; therefore, the CHRIS Functional Team needs to receive the spreadsheets 2-3 days before the Friday before the effective date of the award. Otherwise, the action may be delayed a pay period.

#### **Requesting Mass Performance Ratings With Awards**

- **Step 1:** Logon on to CHRIS using your site's query ID and password.
- Step 2: Path: PeopleTools > Query Manager > Use > Query Manager. Type N\_Mass in the "Search For" field and click on the Search button to generate a list of mass action queries. In the resulting query list, click on the "Run" hyperlink for N MASS PERFAWARDS CANDIDATES to generate a list of your employees.
- **Step 3:** Click on the hyperlink for 'Download results in : <u>an Excel Spreadsheet</u>' to run the report to EXCEL. On the File Download page, select "Open this file from its current location" and click on OK. If you see an 'Open With' window, choose MicroSoft Excel as the program you want to use.
- **Step 4:** You will receive a prompt box to enter:
  - ReviewDate
  - ReviewFrom
  - ReviewTo

If you enter these dates the corresponding columns will populate on the spreadsheet. You may choose to leave one or more of these date columns blank. If these dates are not entered in the prompt box, the spreadsheet will generate without information in these columns.

The following data fields will be included in the EXCEL report: POI, SA, Emplid, NID, Name, Acct Code, Deptid, Pay Plan, Grade, Step, Base Pay, Wrk Sched, Hire Date, Last Promo Date, Old Rvw Date, Awd Amt, Awd Hrs, New Rvw Dt, Review From, Review To, Rating Pattern, Perf Rating, and Mgr Level.

- Step 5: The spreadsheet will contain the most recent performance information from CHRIS in the Rating Pattern and Perf Rating columns. The new rating information must be reflected in these columns when your spreadsheet is sent to the CHRIS staff for processing. If your office uses Pattern "A" (pass/fail), and your pattern has not changed during the period, very few changes will need to be made to these columns. If your office uses other than a Pattern of "A" (pass/fail), you should clear the Perf column (except the column header) immediately to ensure that the old level is not confused as the new level.
- Step 6: Complete/revise the following columns before sending your spreadsheet(s) to the CHRIS staff for processing. If you need to make changes to the performance date columns referenced below, these columns must be reformatted in "Text" format before changes are made. Highlight the columns. From the EXCEL menu select Format/Cells/Number Tab/Text.

**Awd Amt:** Enter the amount for any cash awards – Leave "0" in this cell if the employee is not receiving a cash award.

**Awd Hrs:** Enter the amount for any time-off awards – Leave "0" in this cell if the employee is not receiving a time-off award.

**New Rvw Dt:** Enter the new Date (Format: YYYY-MM-DD).

**Review From:** Enter the beginning date of the period (Format: YYYY-MM-DD).

**Review To:** Enter the ending date of the period (Format: YYYY-MM-DD)

Rating Pattern: Be sure this column contains the pattern for the new ratings being processed.

**Perf Rating:** Be sure this column reflects the employee's new Performance Rating.

**Step 7:** Save the report using a file name that you choose.

**Step 8:** The spreadsheet may be used for award calculations. However, please heed the following warnings:

#### **WARNINGS:**

- COLUMNS "A" THROUGH "V" MUST NOT BE ALTERED.
- IF AWARD CALCULATIONS ARE PERFORMED IN THIS EXCEL FILE, COLUMNS "W" THROUGH "IV" MUST BE USED FOR THESE CALCULATIONS.
- THE ACTUAL AWARD <u>AMOUNT</u> (NOT FORMULA) MUST BE PASTED IN COLUMN "P" FOR AWARD NOA CODES 840, 841, 842, 843, 845, 878, AND 879.
- THE ACTUAL AWARD <u>HOURS</u> (NOT FORMULA) MUST BE PASTED IN COLUMN "Q" FOR NOA CODES 846 AND 847.
- ANY NEW COLUMNS ADDED FOR CALCULATIONS MUST BE REMOVED FROM THE SPREADSHEET BEFORE IT IS FORWARDED TO THE CHRIS FUNCTIONAL STAFF FOR MASS AWARDS PROCESSING.
- **Step 9:** If an employee in the group will receive a rating but not an award, enter the rating information and do not alter the Awd Amt or Awd Hrs columns.
- Step 10: For NOA Codes 840, 841, 842, 843, 845, 878, or 879, enter the Awd Amt in column "P"; for NOA Codes 846 and 847, enter the Awd Hrs in column "Q".
- **Step 11:** Remove any columns used for award calculations and save the spreadsheet.
- **Step 12:** Send the EXCEL file(s) by e-mail to <a href="mailto:cHRISFunctional@netl.doe.gov">CHRISFunctional@netl.doe.gov</a> and include in the e-mail the following parameters for each run:

#### **Award Parameters:**

Provide the following award parameters to the CHRIS staff in your e-mail that transmits your completed spreadsheet:

Effective Date
Action Taken Date
Reason Code
NOA Code
Legal Authority (For NOA Code 878 actions only)

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This information should be provided to the CHRIS staff as soon as the spreadsheet is completed and the effective date established. These mass actions should be processed during the pay period in which they are effective. A separate spreadsheet will be needed if the NOA Code/Reason Code and/or Effective Date are different within the cash award group or if these parameters are different within the time-off awards group.

- **Step 13:** Once the mass processing has been completed, the CHRIS staff will provide reports of the mass ratings and awards completed as well as any that will need to be processed manually.
- **Step 14:** As always, if you have any questions or if the CHRIS staff can be of assistance, please do not hesitate to call the CHRIS Functional Hotline on (304) 285-1310.

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## 12.6 Mass Cleanup "Reports To"

## PROCEDURES FOR REQUESTING MASS CORREC-TIONS/UPDATES TO "REPORTS TO POSITION" AND "SUPERVISOR ID"

Mass processing capability is available to correct/update "Reports to Position" and "Supervisor ID" information. Two different processes will be used to make these changes. Existing Position Data records and personnel transactions may be updated or new rows of data may be inserted, depending on the effective date of the requested changes and the effective date of the employee's most recent position and personnel transactions. These processes will update records for active positions and active employees only.

## "Reports to" Cleanup

This process will be used to update "Reports to" information on both the Position Data and personnel transactions for an entire subagency, or for a portion of a subagency. It provides a feature to identify "included" or "excluded" Department ID's within a given subagency. These updates will be based solely on the Department Manager's position identified in the Department Table.

## "Reports to" Changes

This process will be used to update/change "Reports to" information on both Position Data and Job records when the process involves more than 15 employees and (1) there are multiple supervisors within a Department ID, (2) there is a different supervisor other than the one identified in the Department Table, or (3) there are only selected employees or positions within a Department ID to be changed/updated.

## To request mass processing to "Reports to" information:

1. Print the following reports from CHRIS using the following path:

### **Define Business Rules > Manage Human Resources > DOE Reports**

(You may also request these reports in EXCEL format by calling the CHRIS Functional Hotline (304) 285-1310)) or sending an e-mail to <a href="mailto:CHRISFunctional@netl.doe.gov">CHRISFunctional@netl.doe.gov</a>.)

- Department Managers Report
- "Reports to" Report
- "Reports to" Differences

## **Develop Workforce > Manage Positions > DOE Reports**

- Vacant Positions Report
- 2. Carefully review the Department Managers Report. Using a black pen, annotate the report with the name, position number, and the effective date the supervisor entered the supervisory position for any required revisions. Fax the changes to the CHRIS Functional Hotline at (304) 285-0902. Once these corrections are made to the "Manager's Position" in the Department Table by the CHRIS staff, the "Reports to Position" number will

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automatically populate when new Position Data records are established in CHRIS. However, these changes will not automatically update positions or transactions already in CHRIS.

- 3. Carefully review the Vacant Positions Report and inactivate any positions that will not be filled in the near future. Provide a list of vacant positions to be included in the mass updates with appropriate supervisory information to the CHRIS staff. These changes can be annotated on your Vacant Positions Report. Reminder All <u>active</u> positions (occupied or vacant) will be updated automatically when the Mass "Reports to" Cleanup described above is run. Inactive positions will not be updated in either process.
- 4. Review the "Reports to" Report and the "Reports to" Differences for all employees within your subagency. Using a black pen, annotate the reports with any required "Reports to Position" changes. Please include on your report the supervisor's name, Emplid, position number, and the effective date the supervisor entered a new supervisory position. Also, include the effective date for the requested changes. It is recommended that these changes be effected with a current date rather than retroactively. The main focus should be to ensure that the most recent Position Data record and personnel transaction contains correct supervisory information.
- 5. Fax a copy of the report to the CHRIS Functional Hotline at (304) 285-0902 to request mass changes.
- 6. Mass processes are typically run on the Thursday following the beginning of the pay period in which they are effective. Please ensure that your requests allow sufficient lead time for the CHRIS Functional Staff to plan and run the process.
- 7. The CHRIS staff will review requests for mass "Reports to" updates/corrections, determine which mass process to use to accomplish the requested changes and run mass updates working closely with the HRPOC or other individual designated by the HRPOC to resolve questions/issues.
- 8. After the CHRIS staff has completed mass updates, the HR Office will be asked to print new copies of the reports discussed in number 1 above to verify that employees report to proper supervisors following the mass updates.
- 9. These mass processing capabilities do not preclude offices from processing manual transactions to update "Reports to" information.

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# 12.7 Mass Personnel Office Identifier (POI) Change (NOA Code 800)

## **REQUESTING MASS POI PROCESSING**

Lead time is needed to process actions; therefore, the CHRIS Functional Team needs to receive the spreadsheet the Friday prior to the effective date of the change. Otherwise, the action may be delayed a pay period.

### **POI Determination**

The CHRIS Functional Staff will help the gaining office determine whether to use the gaining offices existing POI or to use the gaining offices existing POI plus an added alpha character.

#### Rule of Thumb

If the losing office is being changed to the same POI as the gaining office then the losing office must also change their Sub-Agency code to the gaining office's Sub-Agency code. This change in Sub Agency code is accomplished via the same NOAC 800 action. If the gaining office chooses to add an alpha character to their POI for the change then the losing office can continue to use their current Sub Agency code.

Example: If Richland Operations Office, Sub-Agency RL, POI 1953, would gain the personnel authority for the Ohio Field Office, Sub-Agency OH, POI 4298, they could be changed to the current Sub-Agency/POI of RL-1953 or they could changed to OH-1953A.

## **Supporting Data**

If an entire POI is changing, this should be stated on the requesting e-mail. If only selected organizations within that POI are changing while other organizations will remain in that POI, then a crosswalk will be needed. The CHRIS HR Functional Staff will provide a crosswalk to the gaining personnel office, unless the gaining office can access the losing office's data. When the gaining office has access to the losing office's data then the gaining office can provide the crosswalk with the changes identified.

To create your crosswalk, use your Query Site ID, to run the query **N\_MassPOIChg\_MassReorg\_Request**. The query will prompt you for a full or partial Department ID. The query will include the following criteria: Sub-Agency, POI, Department ID, Department, Name, Position Number, Jobcode, and Emplid.

When the need arises for use of this report, it is important that you **do not** delete or remove any employees from the report. In order for the CHRIS Staff to process the mass actions, you will need to add one or two columns to the

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end of the spreadsheet depending on if just the POI is changing or if the Sub-Agency and POI are changing. Label the column "New POI" or if appropriate add two columns labeled "New Sub-Agency" and "New POI" if both the Sub-Agency and POI are changing.

## **Process Complete**

The CHRIS HR Functional Staff will notify the gaining office when the mass NOAC 800 actions have been processed, at which time you should print the SF-50's. Refer to CHRIS HR Users' Manual Section 12.3, "Mass Printing," for instructions on mass SF-50 printing.

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# 13 Web Applications

## **Contents**

- **⇒** Employee Service Record (Formerly SF-7)
- **⇒** Microsoft Access Automated SF-50
- **⇒** Microsoft Access Automated SF-52

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## 13.1 Employee Service Record - (Formerly SF-7)

The Employee Service Record web application utilizes the historical employee service data maintained in DOEInfo (Corporate Employee Data Repository). Historical employee service data contained in DOEInfo was initially populated from PAY/PERS data and is continually updated on a daily basis with all new actions processed in CHRIS.

#### TO GAIN ACCESS TO SF-7 EMPLOYEE SERVICE RECORD WEB APPLICATION:

This application is intended for use by staff of Servicing Personnel Offices who need to view or print Employee Service Record data. Access to the data requires that the user have:

- ⇒ A DOEInfo User ID and password and
- ⇒ Be authorized to have SF-7 access privileges.

Users who do not already have a DOEInfo User ID and password should submit an electronic access request via the DOEInfo Homepage.

⇒ Using your Internet browser, open the following web address:

https://mis.doe.gov/doeinfo/

- ⇒ When the DOEInfo Homepage appears, you may wish to bookmark or save this address as a favorite.
- ⇒ At the bottom of the DOEInfo homepage, click on the purple button labeled "ACCESS REQUEST."
- ⇒ Carefully follow the instructions to request access.
- ⇒ Complete the access form, making sure to check the box by the role of SF-7 GLOBAL. In the comments box, please indicate your position and state your requirement to access the SF-7 as part of your official duties. While you are requesting access for SF-7, you may desire to request either Personnel Office or Resource Manager roles for your organization as well.
- ⇒ Press the submit button at the bottom of the form.
- ⇒ You will receive notification of your User ID and password within 24 hours.

Users who already have a DOEInfo User ID and password but require the additional privilege authorization to access the SF-7 data should also submit an electronic access request.

⇒ Follow the instructions listed above. Your previously approved access request will appear and your current access roles will be checked. At step 5, check the box by the role of SF-7 Global. Please do not uncheck previously authorized roles. In the comments box, enter a brief statement indicating your requirement for SF-7 access.

## USING THE SF-7 EMPLOYEE SERVICE RECORD WEB APPLICATION:

Once you receive your DOEInfo User ID and password and have been authorized access privileges to the SF-7 data, you will be able to access the SF-7 Employee Service Record Request web application. You currently have two methods of navigating to the SF-7 Employee Service Record Request page. From the DOEInfo homepage, <a href="https://doeinfo.doe.gov">https://doeinfo.doe.gov</a>, you may click on the lower right hand button labeled "Applications," then select SF-7 option from the next page.

A quicker method is to set a bookmark or favorite in your web browser that will take you directly to the site. To do so:

⇒ Open the following web address:

https://doeinfo.doe.gov/pers/s(+)/

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⇔ Once the Employee Service Record Sign-In page appears, set your browser bookmark or favorite. This will allow you a method to quickly navigate to this webpage in the future. Instructions for using this web application are provided on each page. Please note the special printing instructions regarding browser font size settings and page breaks. Also, if you desire to print only the first page of the SF-7, which contains data that may particularly be needed to process death cases, for preparing retirement calculations, and other HR functions, you may do so by selecting 'FILE' on your browser menu bar, then click on PRINT, and depending on your browser just request page 1 or the current page to be printed.

You should be aware that any version browser will provide you the ability to access the SF-7 application and print Employee Service Records. However, printed pages may not properly page break with older version browsers. Either Netscape Navigator 4.0 or Microsoft Internet Explorer 4.0 are highly recommended to assure better printing results.

Should you have any questions, please feel free to contact Frank Casaleno at (301) 903-3529 or via Internet at <a href="mailto:frankcasaleno@hq.doe.gov">frankcasaleno@hq.doe.gov</a>.

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## 13.2 Microsoft Access Automated SF-50

Below are step by step instructions on downloading and using the Microsoft Access Database and instructions to generate SF-50's that are not able to be produced within CHRIS. To utilize this program you must have Microsoft Access 97 or higher version.

#### **Downloading the Database and Instructions:**

- ⇒ From the CHRIS Homepage (http://chris.inel.gov) click on CHRIS HR/TR USERS.
- ⇒ Locate and click on the bullet entitled "Forms & Benefits."
- ⇒ Under Standard Forms there is a bullet which contains the link "Microsoft Access Automated SF-50" with the instruction to right click on the link and download the database file. You may wish to set up a separate directory on your computer to download this file to and use this directory to store saved versions of the SF-50's you create over time. Save the database file to your hard drive. The database name (SF-50.mdb) is the default database name.
- ⇒ Open Microsoft Access 97 (or higher version) and select the database you have saved to your hard drive.
- ⇒ Follow the same procedure to download the "Instructions for Microsoft Access Automated SF-50" and print them to refer to as needed.

### Using the Database:

- ⇒ Once the database is opened, you will see a series of option buttons across the top and a blank form for your use. You may fill in the form in any order you care to, however, the tab key is set up to take you from field to field in numerical order within the form.
- ⇒ Date fields within the form are designed to have the century used in them.
- ⇒ The "From: Position Title and Number" and the "To: Position Title and Number" (Blocks 7 and 15) are designed so that you may enter the position title, PD Number and Position Number as necessary. While the information may scroll from view, it will all print on the SF-50. Once in these fields, use the enter key to move to a new line. Using the up and down arrow keys will allow you to scroll through the field.
- ⇒ You will see that the Total Salary fields (Blocks 12 and 20) are grayed out. These fields will automatically calculate and populate based on the salary information that you provide in the Basic Pay (Blocks 12A and 20A), Locality Pay (Blocks 12B and 20B), and the Other Pay (Blocks 12D and 20D).
- ⇒ The Name and Location of Position's Organization fields (Blocks 14 and 22) are designed as Blocks 7 and 15. Again, while the information may scroll from sight, the information will all print on the SF-50. Use the enter key to move to a new line and the up and down arrow keys to scroll through the field.

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- ⇒ Employing Department or Agency (Block 46) and Agency Code (Block 47) have been auto populated for your convenience, however, these fields are fully editable if you are recreating an SF-50 that would have been generated in another agency.
- After you have created your SF-50, you may use any of the large buttons at the top of the screen to preview, print or create/delete SF-50's. An explanation of the use of each of these buttons is in the instructions that you downloaded from the CHRIS website. When printing an SF-50, you must use the large "Print" button that appears at the top of the form. Any other method of printing will not generate a complete and proper form.
- ⇒ Once you have finished creating the SF-50 and exit the SF-50 is saved to the database and when you come into the database the next time, you are able to access the SF-50's you have created by using the back button at the top of the screen. You also have the option to use the "Save As" feature and save your SF-50 to a separate file.

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## 13.3 Microsoft Access Automated SF-52

Below are step by step instructions on downloading and using the Microsoft Access Database and instructions to generate SF-52's that are not able to be produced within CHRIS. To utilize this program you must have Microsoft Access 97 or higher version.

## **Downloading the Database and Instructions:**

- ⇒ From the CHRIS Homepage (<a href="http://chris.inel.gov">http://chris.inel.gov</a>) click on CHRIS USERS.
- ⇒ Locate and click on the bullet entitled "Personnel Forms."
- ⇒ Under Standard Forms there is a bullet which contains the link "Microsoft Access Automated SF-52" with the instruction to right click on the link and download the database file. You may wish to set up a separate directory on your computer to download this file to and use this directory to store saved versions of the SF-52's you create over time. Save the database file to your hard drive. The database name (SF-52.mdb) is the default database name.
- ⇒ Open Microsoft Access 97 (or higher version) and select the database you have saved to your hard drive.
- ⇒ Follow the same procedure to download the "Instructions for Microsoft Access Automated SF-52" and print them to refer to as needed.

#### Using the Database:

- ⇒ Once the database is opened, you will see a series of option buttons across the top and a blank form for your use. You may fill in the form in any order you care to, however, the tab key is set up to take you from field to field in numerical order within the form.
- ⇒ Date fields within the form are designed to have the century used in them.
- ⇒ The From: Position Title and Number and the To: Position Title and Number (Blocks 7 and 15) are designed so that you may enter the position title, PD Number and Position Number as necessary. While the information may scroll from view, it will all print on the SF-52. Once in these fields, use the enter key to move to a new line. Using the up and down arrow keys will allow you to scroll through the field.
- ⇒ The Name and Location of Position's Organization fields (Blocks 14 and 22) are designed as Blocks 7 and 15. Again, while the information may scroll from sight, the information will all print on the SF-52. Use the enter key to move to a new line and the up and down arrow keys to scroll through the field.
- After you have created your SF-52, you may use any of the large buttons at the top of the screen to preview, print or create/delete SF-52's. An explanation of the use of each of these buttons is in the instructions that you downloaded from the CHRIS website. When printing an SF-52, you must use the large "Print" button that appears at the top of the form. Any other method of printing will not generate a complete and proper form.

Once you have finished creating the SF-52 and exit the SF-52 is saved to the database and when you come into the database the next time, you are able to access the SF-52's you have created by using the back button at the top of the screen. You also have the option to use the "Save As" feature and save your SF-52 to a separate file.

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## 14 CHRIS Terms/Codes

#### **Contents**

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- **⇒** Pay Plans and Pay Tables in CHRIS
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- **⇒** FERS Coverage Codes
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- **⇒** Retirement Plan Codes
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- **⇒ Work Schedule Codes**
- **⇒** Rating Patterns
- **⇒** Earning Codes
- **⇒** Competitive Areas
- **⇔** CHRIS Glossary

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# 14.1 CHRIS Action/Reason Code and Nature of Action Combined Crosswalk

Action Code	Action Description	Action/Reason Code	Nature of Action/Codes
ADL	Concurrent Appointment	CAR - Career Appointment CCA - Career-Conditional Appointment	100 - Career Appt 101 - Career-Cond Appt 107 - Emergency Appt 120 - O/S Ltd Appt 130 - Transfer 132 - Mass Transfer 140 - Reins-Career 141 - Reins-Career 147 - Exc Appt 171 - Exc Appt NTE 198 - Interim Appt in Nonduty Status
ASC	Intl Assignment Completion	ASC – Intl Assignment Completion	500 - Conv to Career Appt
ASG	Intl Assignment	FEX – Foreign Expatriate Assignment FIN – Foreign Inpatriate Assignment FLA – Foreign Loan Assignment NAT – Third Country National	520 - Conv to O/S Ltd Appt
AWD	Award - Monetary	ENB - NNSA EN Empl Perf Bonus GNG - Group Gainsharing Award GNS - Individual Gainsharing Award ING - Group Invention Award (Patent) INV - Individual Invention Award (Patent) NBG - Superior Accomplishment/Personal Effort Group Cash Award - NBO-WAPA Only NBO - Superior Accomplishment/Personal Effort Individual Cash Award - NBO-WAPA Only NBS - Superior Accomplishment/Personal Effort Individual Cash Award - NBS-WAPA Only NSG - Superior Accomplishment/Personal Effort Group Cash Award - NBS-WAPA Only OTG - On-The-Spot Group Award OTS - On-The-Spot Individual Award PAW - SES Performance Award PCA - Performance Rating Cash Award RNK - SES Rank Award SCA - Superior Accomplishment/Personal Effort Individual Cash Award SCG - Superior Accomplishment/Personal Effort Group Cash Award SCG - Group Suggestion Award SCG - Group Fime-Off Suggestion Award TOS - Individual Time-Off Suggestion Award TOS - Individual Time-Off Suggestion Award TSA - Time-Off Superior Accomplishment/Personal Effort Individual Cash Award TSG - Time-Off Superior Accomplishment/Personal Effort Individual Cash Award TSG - Time-Off Superior Accomplishment/Personal Effort Individual Cash Award TSG - Time-Off Superior Accomplishment/Personal Effort Individual Cash Award TSG - Time-Off Superior Accomplishment/Personal Effort Individual Cash Award	817 - Student Loan Repayment 840 - Individual Cash Award 841 - Group Cash Award 842 - Individual Suggestion/Invention Award 843 - Group Suggestion/Invention Award 845 - Travel Savings Incentive 846 - Individual Time-Off Award 847 - Group Time-Off Award 878 - SES Rank Award 879 - SES Performance Award

BON	Bonus	REC – Recruitment Bonus	815 - Recruitment Bonus
		REL – Relocation Bonus	816 - Relocation Bonus
		SEP – Separation Incentive	825 - Separation Incentive
DEM	Character Lauren Carala	RFB – Referral Bonus	848 – Referral Bonus
DEM	Change to Lower Grade	CAO – Change to Lower Grade - CAO	713 - Change to Lower grade 740 - Position Change
		CMP – Competitive Selection EMP - At Employee's Request	740 - Position Change 741 - Position Change NTE
		FPP – Failed Probationary Period	741 - I OSITION CHANGE INTE
		ING - RIF - No Grade Retention	
		MIS – Misconduct	
		MSP – MSPB Decision	
		NCS - Issuance of New Class Standards	
		OMB – Resulting from OMB Circular A-76	
		ORG – Reorganization	
		OTH – Other	
		PLF – Placement in lieu of RIF	
		PSC – Position Change	
		RCL – Resulting from Reclassification	
		RFF - Resulting from RIF	
		RGR - RIF - Grade Retention	
		RPL – Resulting from RPL, CTAP, ICTAP	
		RTN – Change to Lower Grade	
		TTP – Termination of Temporary Promotion USP – Unsatisfactory Performance	
		VRA – VRA Appointment	
DTA	Data Change	B&R - Change Fund Type/B&R Code	750 - Continuance NTE
DIA	Data Change	CAC – Change - Agency Code	755 - Exception to RIF Release
		CAI - Change – Annuitant Indicator	780 - Name Change From
		CBU - Change – Bargaining Unit	781 - Change in Work Schedule
		CCP - Change/Correct Position Number	782 - Change in Hours
		CDE - Change in Data Element	792 - Change in Duty Station
		CDP – Correction Department	800 - Change in Data Element
		CFC - Change – FLSA Category	803 - Change in Retirement Plan
		CJC – Correction-Job Code	805 - Elected Full Living Benefits
		COC - Change – Occup Code	806 - Elected Partial Living Benefits
		CON – Change in Organization Name	880 - Change in Tenure Group
		CPI - Change – Personnel Office ID	881 - FEGLI Change
		CPO - Change – Position Occupied	882 - Change in SCD
		CPR - Change – Pay Rate Determinate CSA – Change in Sub-Agency	883 - Change in Vet Preference for RIF 888 - Denial of WGI
		CSA – Change in Sub-Agency CSO – Change in Sub-Agency & Org Name	904 – Change Fund Type/B&R Code
		CSV – Change in Supervisor	927 – Change in Sub-Agency
		CTL – Change in Title	928 - Change in Sub-Agency & Org Name
		DTY - Change in Duty Station	929 - Change in Organization Name
		DWI - Denial of Within Grade Increase	933 - Change in Title
		EMP - At Employees Request	940 – Standby Premium Pay
		EXC - Exception to RIF Release	941 – Non-Foreign COLA
		FEG - FEGLI Change	942 – Post Allowance
		FLB - Elected Full Living Benefits	943 – Foreign Post Differential
		FTI – From FT to Int	944 – Home Leave Authorization
		FUL - From Part-Time to Full-Time	945 – Physician's Comparability
		HRS - Change in Hours	946 - Danger Pay
		IFT – From Int to FT	966 - Change/Correct Non-SF-50 Element
		IPT – From Int to PT	
		NMC - Name Change	
		NSF – Change/Correct Non-SF-50 Element	
		NTE - Continuance NTE	
		OTH – Other  PAR From Full Time to Part Time	
		PAR - From Full-Time to Part-Time	
		PLB - Elected Partial Living Benefit PTI – From PT to Int	
		RET - Change in Retirement Plan	
		SCD - Change in SCD	
		SCD - Change in SCD	

		TEN - Change in Tenure Group	
		VET - Change in Veterans Preference	
EXT	Extension of NTE Date	CON - Conversion to Appt NTE EAN - Extension of Appt NTE EEA - Conversion to Exc Appt NTE EFN - Extension of Furlough NTE ELP - Extension of LWOP NTE EPC - Extension of Position Change NTE EPN - Extension of Promotion NTE ESE - Extension of SES Limited Appt NTE ETA - Ext of Term Appt NTE EXT - Extension of NTE Date SLG - Assignment to State/Local Gov.	515 - Conversion to Appt NTE 571 - Conv to Excepted Appt NTE 760 - Extension of Appt NTE 762 - Extension of SES Limited Appt NTE 765 - Ext of Term Appt NTE 769 - Extension of Prom NTE 770 - Extension of Position Change NTE 772 - Extension of Furlough NTE 773 - Extension of LWOP NTE
Пір	Hira		100 Career Appt
HIR	Hire	ADM – Administrative Accession BRO - Brought into Competitive Service CMP - Competitive Appointment DEM - Change to Lower Grade ECA - Expert/Consultant Appointment EMG - Emergency Appointment EXC - Excepted Service Appointment EXO - Executive Order Appointment FNA - Foreign National Appointment IPA - Intergovernmental Personnel Act LAT - Lateral MIL - Military NPS - New Position OVS - Overseas Limited Appointment PRO - Promotion RES - Reinstatement Appointment RRR - Restoration/Reemployment Right SCH - Schedule A, B, C, Appointment SES - Senior Executive Service Appt STQ - Appointment Status Quo TMP - Temporary Appointment TRN - Trainee VOL - Volunteer Appointment VRA - VRA Appointment XFR - Transfer from Agency ZCL - Change to Lower Grade - CAO ZCV - Conversion to - Appt - CAO ZPC - Position Change - CAO ZRS - Reassignment - CAO	100 - Career Appt 101 - Career-Cond Appt 107 - Emergency Appt 108 - Term Appt NTE 112 - Term Appt - PER 115 - Appt NTE 120 - O/S Ltd Appt 122 - O/S Ltd Appt 122 - O/S Ltd Appt NTE 124 - Appt - Status Quo 130 - Transfer 132 - Mass Transfer 132 - Mass Transfer 140 - Reins-Career 141 - Reins-Career-Cond 142 - SES Career Appt 143 - Reins-SES Cond 145 - Transfer SES Career 146 - SES Noncareer Appt 147 - Transfer SES Noncareer 148 - SES Ltd Term Appt NTE 149 - SES Ltd Emergency Appt NTE 170 - Exc Appt 171 - Exc Appt NTE 190 - Provisional Appt NTE 198 - Interim Appt in Nonduty Status 199 - Interim Appt 500 - Conv to Career Appt 501 - Conv to Career Appt 507 - Conv to Emergency Appt 508 - Conv to Temp Appt NTE 512 - Conv to Temp Appt NTE 513 - Conv to Reins-Career 541 - Conv to Reins-Career 541 - Conv to Reins-Career 542 - Conv to SES Career Appt 543 - Conv to SES Career Appt 544 - Conv to SES Ltd Emergency Appt NTE 559 - Conv to SES Ltd Emergency Appt NTE 570 - Conv to SES Ltd Emergency Appt NTE 570 - Conv to SES Ltd Emergency Appt NTE 571 - Conv to SES Ltd Emergency Appt NTE 572 - Conv to SES Ltd Emergency Appt NTE 573 - Conv to SES Ltd Emergency Appt NTE 574 - Conv to SES Ltd Emergency Appt NTE 575 - Conv to SES Ltd Emergency Appt NTE 570 - Conv to SES Ltd Emergency Appt NTE 570 - Conv to Exc Appt NTE 571 - Conv to Exc Appt NTE 572 - Promotion 773 - Promotion NTE 773 - Change to Lower Grade 721 - Reassignment 740 - Position Change 741 - Position Change

LOA	Leave Without Pay	EDU – Education	430 - Placement in NonPay Status
LUA	Leave willout I ay	FML - Family and Medical Leave Act	460 - LWOP NTE
		HEA - Health Reasons	473 - LWOP - US
		MAT - Maternity/Paternity	480 - Sabbatical NTE
		MIL - Military Service	
		OTH – Other	
		PTD - Partial/Total Disability	
		REL - Relocation	
		SAB - Sabbatical NTE	
		SEA - Seasonal	
		SLG - Assignment to State/Local Gov.	
		USH - Unpaid Statutory Holiday	
LOF	Furlough	FUR - Furlough/Furlough NTE	471 - Furlough
		RED - Staff Reduction	472 - Furlough NTE
		SEA - Seasonal Closure	
LTO	Long Term Disability	LTO - Long Term Disability	460 - LWOP NTE
PAY	Pay Rate Change	ADJ - Adjustment	810 - Change in Allowance/Differential
		ALD - Change in Allowance/Differential	818 - AUO
		AUO – Begin AUO	819 - Availability Pay
		AUT – Terminate AUO	850 - MD/DDS Special Pay
		AVP - Availability Pay	855 - Head Nurse Pay
		COL - Cost-of-Living	866 - Termination of Grade Retention
		GMW - GM WGI	867 - Interim WGI
		MER - Merit	868 - Termination of Interim WGI
		OTH - Other	891 - GM WGI
		QSI - Quality Increase	892 - Quality Inc
		SPG - Step Progression	893 - WGI
		TGR - Termination of Grade Retention	894 - Pay Adj
		WGI – Within Grade Increase	895 - Locality Payment
DI A	D:11 C41	DDD D I' D' L'I' D C	899 - Step Adjustment
PLA	Paid Leave of Absence	PDR – Pending Disability Retirement	480 – Sabbatical NTE
		PTD – Partial/Total Disability	
DOC	Dogition Character	SEA – Seasonal	500 Conversion to C At
POS	Position Change	CAO - Position Change – CAO	500 - Conversion to Career Appt 721 – Reassignment
		COC – Change in Occupational Code CON – Change in Org Name	740- Position Change
		CSA – Change in Sub-Agency	790 - Realignment
		CSO – Change Sub-Agency & Org Name	933 – Change in Title
		CSV – Change in supervisor	755 — Change in Title
		EMP - Employee Request	
		FPP - Failed Probationary Period	
		ILR - In Lieu of RIF	
		INA - Position Inactivated	
		JRC - Job Re-Classification	
		NCS - Issuance of New Class Standard	
		NEW - New Position	
		OTH - Other	
		PRO – Promotion	
		REA – Realignment	
		RED – Reorganization	
		REL – Realignment - CAO	
		RIF - Resulting from RIF	
		RSG – Reassignment	
		STA - Position Status Change	
		TTL – Title Change	
		UPD – Position Data Update	
		XFR – Transfer	
PRO	Promotion	CAO – Promotion - CAO	500 - Conv to Career Appt
		CMP - Competitive Promotion	501 - Conv to Career-Cond Appt
		CNT - Conversion to Appointment NTE	507 - Conv to Emergency Appt
		CNV - Conversion – CAO	508 - Conv to Term Appt NTE
		CPT - Conversion to Appointment	512 - Conv to Term Appt - PER
		ECM - Exception to Competition	515 - Conv to Appt NTE
		ECR - Exception to Competition in Lieu of RIF	520 - Conv to O/S Ltd Appt

REC	Return from	EXC - Promotion Excepted Service FAI - Failure to Receive Proper Consideration NCP - Normal Career Progression NTE - Promotion NTE OTH - Other RFR - Reclassification RPR - Re-Promotion (Exception to Comp) RTL - Removal of Time Limitation UPG - Upgrade	522 - Conv to O/S Ltd Appt NTE 524 - Conv to Appt - Status Quo 540 - Conv to Reins-Career 541 - Conv to Reins-Career 541 - Conv to SES Career Appt 543 - Conv to Reins-SES Career 546 - Conv to SES Noncareer Appt 548 - Conv to SES Ltd Term Appt NTE 549 - Conv to SES Ltd Emergency Appt NTE 570 - Conv to Exe Appt 571 - Conv to Exe Appt 570 - Conv to Provisional Appt NTE 702 - Promotion 703 - Promotion NTE 292 - Return to Duty
REC	Suspension/Furlough	RTD - Return to Duty	292 - Return to Duty
REH	Rehire	CMP - Competitive Appointment ECA - Expert/Consultant Appointment EMG - Emergency Appointment EXC - Excepted Service Appointment EXO - Executive Level Appointment FNA - Foreign National Appointment IPA - Intergovernmental Personnel Act MIL - Military OVS - Overseas Limited Appointment RES - Reinstatement/Reemployment RRR - Restoration/Reemployment Right SCH - Schedule A, B, C Appointment SES - Senior Executive Service Appt STQ - Appointment Status Quo TMP - Temporary Appointment TRN - Trainee VOL - Volunteer Appointment VRA - VRA Appointment VRA - Transfer from Agency	100 - Career Appt 101 - Career-Cond Appt 107 - Emergency Appt 108 - Term Appt NTE 112 - Term Appt - PER 115 - Appt NTE 120 - O/S Ltd Appt 122 - O/S Ltd Appt 122 - O/S Ltd Appt NTE 124 - Appt - Status Quo 130 - Transfer 132 - Mass Transfer 132 - Mass Transfer 140 - Reins-Career 141 - Reins-Career 141 - Reins-Career 143 - Reins-SES Cond 145 - Transfer SES Career 146 - SES Noncareer Appt 147 - Transfer SES Noncareer 148 - SES Ltd Term Appt NTE 149 - SES Ltd Emergency Appt NTE 170 - Exc Appt 171 - Exc Appt NTE 190 - Provisional Appt NTE 198 - Interim Appt 500 - Conv to Career Appt 501 - Conv to Career Appt 507 - Conv to Emergency Appt 508 - Conv to Temp Appt NTE 512 - Conv to Temp Appt NTE 512 - Conv to Reins-Career 541 - Conv to Reins-Career 541 - Conv to Reins-Career 541 - Conv to SES Career 546 - Conv to SES Noncareer Appt 543 - Conv to SES Ltd Emergency Appt 544 - Conv to SES Ltd Emergency Appt 550 - Conv to Reins-Career 541 - Conv to SES Ltd Emergency Appt 543 - Conv to SES Ltd Emergency Appt 544 - Conv to SES Ltd Emergency Appt 545 - Conv to SES Ltd Emergency Appt 546 - Conv to SES Ltd Emergency Appt 547 - Conv to SES Ltd Emergency Appt 548 - Conv to SES Ltd Emergency Appt 549 - Conv to SES Ltd Emergency Appt 540 - Conv to SES Ltd Emergency Appt 541 - Conv to SES Ltd Emergency Appt 542 - Conv to SES Ltd Emergency Appt 543 - Conv to SES Ltd Emergency Appt 544 - Conv to SES Ltd Emergency Appt 545 - Conv to SES Ltd Emergency Appt 546 - Conv to SES Ltd Emergency Appt 547 - Conv to Fex Appt 548 - Conv to Fex Appt 549 - Conv to Fex Appt 540 - Conv to Fex Appt 541 - Conv to Fex Appt 542 - Conv to Fex Appt 543 - Conv to Fex Appt 544 - Conv to Fex Appt 545 - Conv to Fex Appt 546 - Conv to Fex Appt 547 - Conv to Fex Appt 548 - Conv to Fex Appt 549 - Conv to Fex Appt 540 - Conv to Fex Appt 541 - Conv to Fex Appt 542 - Conv to Fex Appt 543 - Conv to Fex Appt 544 - Conv to Fex Appt 545 - Conv to Fex Appt 546 - Conv to Fex Appt 547 - Conv to Fex Appt 549 - Conv to Fex Appt 540 - Conv to Fex Appt 541 - Conv to Fex Appt 541
RET	Retirement	DIS – Disability ERT - Early Retirement (Special Option)	997 – Administrative Accession 300 - Retirement - Mandatory 301 - Retirement - Disability

		ILI - Retired - ILIA Adverse Action	302 - Retirement - Voluntary
		MAN – Mandatory	303 - Retirement - Special Option
		RET – Retired	304 - Retirement - ILIA
RFL	Return from LWOP	RVL - Retired – Voluntary RFL - Return from LWOP	280 - Placement in Pay Status
KLL	Return from LWOP	KFL - Ketulii Ilolli LWOP	292 - Return to Duty
			293 - Return to Pay Status
STO	Short Term Disability	STD - Short Term Disability	460 - LWOP NTE
SUS	Suspension	DAC - Disciplinary Action	450 - Suspension NTE
	1	DSB - Disorderly Behavior	452 - Suspension - Indefinite
		ILA - Illegal Action	
		IND - Suspension – Indefinite	
TED		NTE - Suspension NTE	212 72 21 21 21 21 21 21 21 21 21 21 21 21 21
TER	Termination	ADM – Administration Separation	312 - Resignation - ILIA
		ATT – Attendance CHI – Child/House Care	317 – Resignation 330 - Removal
		CON – Misconduct	350 – Death
		DEA – Death	351 – Termination - Sponsor Relocating
		DIS – Dishonesty	352 – Termination Appt in
		DPP - During Probationary/Trial Period	353 – Separation - US
		DSC – Discharge	355 – Termination - Exp of Appt
		EES – Dissatisfied w/Fellow Employee	356 – Separation - RIF
		EFT – End of Fixed-Term Contract	357 – Termination
		ELI – Elimination of Position EXP – Expiration of Appointment	385 – Term during prob/trial period 390 – Separation - Appt in
		FAM – Family Reasons	500 – Conv to Career Appt
		HEA – Health Reasons	501 – Conv to Career-Cond Appt
		HRS – Dissatisfied with Hours	507 – Conv to Emergency Appt
		ILL – Illness in Family	508 – Conv to Term Appt NTE
		INS – Insubordination	512 – Conv to Term Appt – PER
		JOB – Job Abandonment	515 – Conv to Appt NTE
		LOC – Dissatisfied with Location	540 – Conv to Reins-Career
		LOW – Lack of Work/Funds LVE – Failure to Return from Leave	541 – Conv to Reins-Career-Cond 542 – Conv to SES Career Appt
		MAR – Marriage	542 – Conv to SES Career Appl 543 – Conv to Reins-SES Career
		MIS – Misstatement on Application	546 – Conv to SES Noncareer Appt
		MSP – Directed by MSPB	548 – Conv to SES Ltd Term Appt NTE
		MUT – Mutual Consent	549 – Conv to SES Ltd Emergency Appt NTE
		OTH – Other	570 – Conv to Exc Appt
		OTP – Resignation - Other Position	571 – Conv to Exc Appt NTE
		PAY – Dissatisfied with Pay	590 – Conv to Provisional Appt NTE
		PER – Personal Reasons POL – Dissatisfied w/Comp. Policies	702 – Promotion 703 – Promotion NTE
		PRM – Dissatisfied w/Promotion Opps	713 – Change to Lower Grade
		PTD – Partial/Total Disability	721 – Reassignment
		RAT - Retired from Affiliate	740 – Position Change
		RED – Staff Reduction	741 – Position Change NTE
		REF – Refused Transfer	903 – Administration Separation
		REL – Relocation	
		RES – Resignation	
		RET – Return to School RIL – Resignation – ILIA	
		RLS – Release	
		RMV – Removal	
		SEC – National Security	
		SUP – Dissatisfied with Supervision	
		TAR – Tardiness	
		TRA – Transportation Problems	
		TYP – Dissatisfied with Type of Work	
		UNS – Unsatisfactory Performance	
		VIO – Violation of Rules	
		VSP – Voluntary Separation Program	
		WOR – Dissatisfied with Work Conditions	
		XFR – Transfer Appt In	_

		ZCL – Change to Lower Grade – CAO	
		ZCV – Conv to Appt – CAO	
		ZPC – Position Change – CAO	
		ZPR – Promotion – CAO	
		ZRS – Reassignment – CAO	
XFR	Reassignment/Conversion	CAO - Conv to Appointment - CAO	500 - Conv to Career Appt
		CRM - Competitive Reassignment	501 - Conv to Career-Cond Appt
		CTA - Conv to Appointment	507 - Conv to Emergency Appt
		EER - Employee Request	508 - Conv to Term Appt NTE
		EXC - Exception to Competition	512 - Conv to Term Appt – PER
		FPP - Failed Managerial/Supervisory Period	515 - Conv to Appt NTE
		ILR - In Lieu of RIF	520 - Conv to O/S Ltd Appt
		MRR - Manager Request	522 - Conv to O/S Ltd Appt NTE
		MSP - MSPB Decision	524 - Conv to Appt-Status Quo
		NCS - Issuance of New Classification Standards	540 - Conv to Reins-Career
		OMB - Resulting from OMB Circular A-76	541 - Conv to Reins-Career-Cond
		PRO - Promotion	542 - Conv to SES Career Appt
		PSC - Position Change - CAO	543 - Conv to Reins-SES Career
		PSN - Position Change	546 - Conv to SES Noncareer Appt
		RCA - Reassignment - CAO	548 - Conv to SES Ltd Term Appt NTE
		RCL - Resulting from Reclassification	549 - Conv to SES Ltd Emergency Appt NTE
		REA - Realignment	570 - Conv to Exc Appt
		RIF - RIF	571 - Conv to Exc Appt NTE
		RLC - Realignment - CAO	590 - Conv to Provisional Appt NTE
		ROR - Reorganization	721 – Reassignment
		ROT - Reassignment (Other)	740 - Position Change
		RPL - Resulting from RPL, CTAP, ICTAP	741 - Position Change NTE
		SES - Senior Executive Service Appt	790 – Realignment
		VRA - VRA Appointment	-

## 14.2 DOE Personnel Office Identifiers/Sub-Agencies

POI	Description	S/A	Sub-Agency Description
1152	Pittsburgh Naval Reactors Ofc	XL	NNSA, Deputy Administrator for Naval Reactors, PNRO
1231	Schenectady Naval Reactors Ofc	XM	NNSA, Deputy Administrator for Naval Reactors, SNRO
1449	Chicago Operations Office	СН	Chicago Operations Office
1481	Savannah River Operations Ofc	SR	Savannah River Operations Office
1609	Idaho Operations Office	ID	Idaho Operations Office
1653	Oak Ridge Operations Office	OR	Oak Ridge Operations Office
1653A	Oak Ridge Operations Office	ST	Office of Energy Research
1653B	NNSA - Oak Ridge Operations Ofc	XJ	NNSA-Oak Ridge Operations Ofc
1785	Albuquerque Operations Office	AL	Albuquerque Operations Office
1785A	NNSA – Service Center	XE	NNSA
1839	Oakland Operations Office	ОО	Oakland Operations Office
1839A	Oakland Operations Ofc	XI	NNSA-Oakland Operations Ofc
1953	Richland Operations Office	RL	Richland Operations Office
2983	Nevada Operations Office	NV	Nevada Operations Office
2983A	Nevada Operations Office	YM	Office of Civilian Radioactive Waste Management
4162	National Energy Technology Laboratory	NT	Assistant Secretary for Fossil Energy, National Energy Technology Laboratory
4162A	National Energy Technology Laboratory	AR	Assistant Secretary for Fossil Energy, Albany Research Center
4225B	DOE Headquarters	ED	Office of Economic Impact & Diversity
4225E	DOE Headquarters	EM	Assistant Secretary for Environmental Management
4225F	DOE Headquarters	FE	Assistant Secretary for Fossil Energy
4225G	DOE Headquarters	GC	Office of the General Counsel
4225H	DOE Headquarters	HG	Office of Hearings & Appeals
4225I	DOE Headquarters	EI	Energy Information Administration
4225J	DOE Headquarters	EH	Assistant Secretary for Environment, Safety & Health
4225K	DOE Headquarters	EE	Assistant Secretary for Energy Efficiency & Renewable Energy
4225L	DOE Headquarters	SC	Office of Science
4225N	DOE Headquarters	NE	Office of Nuclear Energy, Science and Technology
4225O	DOE Headquarters	OS	Office of the Secretary of Energy
4225R	DOE Headquarters	RW	Office of Civilian Radioactive Waste Management
4225S	DOE Headquarters	AB	Office of the Secretary of Energy Advisory Board
4225W	DOE Headquarters	WT	Office of Worker and Community Transition
4225X	DOE Headquarters	CI	A/S for Congressional & Intergovernmental Affairs
4225Y	DOE Headquarters	PA	Office of Public Affairs
4225ZB	DOE Headquarters	IN	Office of Intelligence
4225ZC	DOE Headquarters	CN	Office of Counterintelligence
4225ZE	DOE Headquarters	SO	Office of Security
4225ZF	DOE Headquarters	OA	Office of Independent Oversight & Performance Assurance
4225ZG	DOE Headquarters	XA	National Nuclear Security Admin (NNSA) - Defense Programs, Defense Nuclear Nonproliferation, Naval Reactors
4225ZK	DOE Headquarters	ΡΙ	Assistant Secretary for Policy and International Affairs
4225ZL	DOE Headquarters	ME	Office of Management, Budget & Evaluation
4225ZM	DOE Headquarters	IM	Chief Information Office
	1		

POI	Description	S/A	Sub-Agency Description
4225ZN	DOE Headquarters	EA	Office of Energy Assurance
4225ZP	DOE Headquarters	СВ	Asst. Secretary for Environmental Management
4236A	WAPA, Denver	WA	Western Area Power Administration
4236B	WAPA-Upper Great Plains Region	WB	Western Area Power Administration
4236G	WAPA, Desert Southwest Region	WG	Western Area Power Administration
4236J	WAPA, Rocky Mountain Region	WJ	Western Area Power Administration
4236L	WAPA, Colorado Rvr Storage Prj	WL	Western Area Power Administration
4236N	WAPA, Sierra Nevada Region	WN	Western Area Power Administration
4281	Office Of Inspector General	IG	Office of Inspector General
4284	Southeastern Power Admin	SE	Southeastern Power Administration
4285	Southwestern Power Admin	SW	Southwestern Power Administration
4291	Strategic Petroleum Res Pro Of	SP	Assistant Secretary for Fossil Energy, Strategic Petroleum Reserve Project Management Office
4294	Rocky Flats Field Office	RF	Rocky Flats Field Office
4298	Ohio Field Office	ОН	Ohio Field Office
4327	Golden Field Office	GO	Assistant Secretary for Energy Efficiency & Renewable Energy, Golden Field Office
4327A	Golden Field Office	RS	A/S for Energy Efficiency & Renewable Energy, Regional Offices

# 14.3 Agency To/From Codes

Code	Description
AB	American Battle Monuments Commission
AF	Department of the Air Force
AG	
AH	Department of Agriculture Nat'l Foundation on the Arts &
Ап	Humanities
AI	U.S. Institute of Peace
AM	Agency for International Development
AN	African Development Foundation
AP	Appalachian Regional Commission
-	
AR	Department of the Army
AU	Federal Labor Relations Authority
AW	Arctic Research Commission
BD	Merit Systems Protection Board
BF	Defense Nuclear Facilities Safety Board
BG	Pension Benefit Guaranty Corporation
BH	Commission for the Preservation of
	America's Heritage Abroad
BJ	Illinois and Michigan Canal National
DIA	Heritage Corridor Commission
BK	James Madison Memorial Fellowship
DO.	Foundation Of a f Management and Dudget
BO	Ofc of Management and Budget
BT	Architectural and Transportation Barriers Compliance
BW	Nuclear Waste Technical Review
D W	Commission Board
BZ	Christopher Columbus Fellowship
DZ.	Foundation
CC	Commission on Civil Rights
CE	Council of Economic Advisers
CF	Commission of Fine Arts
CI	Central Intelligence Agency
CM	Department of Commerce
CT	Commodity Futures Trading Commission
CU	National Credit Union Administration
CX	National Commission on Libraries &
	Information Sciences
DA	Delta Regional Authority
DC	Office of Policy Development
DD	Department of Defense
DJ	Department of Justice
DL	Department of Justice  Department of Labor
	Department of Energy
DN	Department of Energy

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Code	Description
EB	Export-Import Bank of the United States
EC	Office of Administration
ED	Department of Education
EE	Equal Employment Opportunity
	Commission
EM	Federal Emergency Management Agency
EO	Morris K. Udall Scholarship &
	Excellence in National Environmental
	Policy
EP	Environmental Protection Agency
EQ	Council on Environmental Quality/Office
- FG	of Environmental Quality
ES	Commission on Executive, Legislative &
EW	Judicial Salaries
EW	Trade and Development Agency
EX	Executive Residence at the White House
FC	Federal Communications Commission
FD	Federal Deposit Insurance Corporation
FI	Federal Financial Institutions
ET	Examination Council
FJ	Chemical Safety and Hazard Investigation Board
FK	
ГК	Farm Credit System Insurance Corporation
FL	Farm Credit Administration
FM	Federal Mediation and Conciliation
1 1/1	Service
FQ	Court Services and Offender Supervision
1 4	Agency for the District of Columbia
FR	Federal Reserve System - Board of
	Governors
FT	Federal Trade Commission
FW	Office of Special Counsel
FY	Federal Housing Finance Board
GB	Overseas Private Investment Corporation
GE	Barry Goldwater Scholarship &
	Excellence in Education Foundation
GG	Office of Government Ethics
GJ	Presidio Trust
GK	Centennial of Flight Commission
GM	Valles Cardera Trust
GN	White House Commission on the National
	Moment of Remembrance
GO	Vietnam Education Foundation

Code	Description
GS	General Services Administration
GW	International Boundary and Water
	Commission: United States and Mexico
GX	International Boundary Commission:
	United States and Canada
GY	International Joint Commission: United
	States and Canada
H5	Federal Energy Regulatory Commission
HB	Committee for Purchase from the People
	Who are Blind or Severely Disabled
HD	U.S. Holocaust Memorial Museum
HE	Department of HHS
HP	Advisory Council on Historic
	Preservation
HS	Department of Homeland Security
HT	Harry S. Truman Scholarship Foundation
HU	Department of Housing and Urban
	Development
IB	Broadcasting Board of Governors
IF	Inter-American Foundation
IN	Department of the Interior
JL	Supreme Court of the United States/US
	Courts
KS	Corporation for National and Community
т А	Service
LA LB	Architect of the Capitol Botanic Garden
LC	Library of Congress
LD	Congressional Budget Office
LF	Federal Election Commission
LG	General Accounting Office
LL	Congress
LP	Government Printing Office
LQ	John C. Stennis Center for Public Service
I T	& Development
LT	U.S. Tax Court
MA	Marine Mammal Commission
MC	Federal Maritime Commission
NF	National Science Foundation
NK	National Council on Disability
NL	National Labor Relations Board
NM	National Mediation Board
NN	National Aeronautics and Space
VID	Administration
NP NO	National CapitSal Planning Commission
NQ	National Archives and Records
	Administration

Code	Description
NS	National Security Council
NU	Nuclear Regulatory Commission
NV	Department of the Navy
OM	Office of Personnel Management
OS	Occupational Safety and Health
OV	Office of the Vice President
PC	Panama Canal Commission
PI	Public International Organization
PJ	Postal Rate Commission
PO	U.S. Postal Service
PU	Peace Corps
QQ	Office of National Drug Control Policy
RE	Office of Navajo and Hopi Indian
	Relocation
RF	Federal Retirement Thrift Investment
	Board
RH	Armed Services Retirement Home
RR	Railroad Retirement Board
RS	Federal Mine Safety and Health Review
	Commission
SB	Small Business Administration
SE	Securities and Exchange Commission
SK	Consumer Product Safety Commission
SM	Smithsonian Institution
SS	Selective Service System
ST	Department of State
SZ	Social Security Administration
TB	National Transportation Safety Board
TC	U.S. International Trade Commission
TD	Department of Transportation
TN	Office of the U.S. Trade Representative
TR	Department of the Treasury
TS	Office of Science and Technology Policy
TV	Tennessee Valley Authority
UJ	Japan-United States Friendship
	Commission
UT	Utah Reclamation Mitigation and
774	Conservation Commission
VA	Department of Veterans Affairs
WH	The White House
XX	Bonneville Power Admin
ZD	U.S. Court of Appeals for Veterans Claims
7.0	
ZG	Office of Compliance
ZL	Medicare Payment Advisory Commission
ZO	Commission on Security and Cooperation

Code	Description
	in Europe
ZP	U.S. Commission on International
	Religious Freedom
ZS	United States – China Security Review
	Commission
ZU	Dwight D. Eisenhower Memorial
	Commission
ZV	Commission on the People's Republic of
	China
ZW	Commission on Ocean Policy
ZX	Abraham Lincoln Bicentennial
	Commission
ZZ	National Commission on Terrorist
	Attacks Upon the United States

## 14.4 Pay Plans and Pay Tables in CHRIS

Pay Plan	Pay Table	Description
AD	00E0	WAPA Shift Security Coordinat
AD	00G0	SWAPA Power Dispatchers – AD
AD	00H0	SWPA Power Dispatchers - AD
AD	00N0	WAPA PowSysDispatch-WA/B/G/J/L
AD	00P0	WAPA PowSysDispatch-WN
AD	00Q0	WAPA Energy Mgmt and Marketing Spec
AD	AD00	Admin. Determined - Per Day
AL	0000	Administrative Law Judges - AL
CA	0000	Board of Contract Appeals
ED	0000	Expert
EF	0000	Consultant
EI	0000	Advisory Committee Mbr.(Other)
EJ	0000	DOE Organization Act
EK	0000	Natl Def Auth Act 1995
EN	0000	NNSA DOE Organization Act
EN	ENDB	DOE Organization Act – DEV Band
ES	0000	Senior Executive Service
EX	0000	Executive Level
GM	0000	General Schedule - GM No Steps
GM	0137	Actuary - Multiple Areas
GM	0220	Johnston Island
GM	0290	Medical Officer
GM	0329	Engineer Civil
GM	0331	Patent Attorney
GM	0485	Patent Attorney
GM	0499	Medical Officer
GM	999B	Info Tech - Various Locations
GM	999C	Info Tech - Various Locations
GM	999D	Info Tech - Various Locations
GM	999E	Info Tech - Various Locations
GM	999F	Info Tech - SF, OK, San Jose
GS	0000	General Schedule
GS	0012	Spec. Sch NY City Clericals
GS	0023	Spec. Sch East MA Clericals
GS	0024	Spec. Sch Grtr SF Bay Cler.
GS	0029	Spec. Sch DC MSA Clericals
GS	0032	Spec. Sch DC Math/Stat
GS	0034	Spec. Sch NY OnSite Cler
GS	0047	Spec. Sch Northern NJ Cler.
GS	0057	Spec. SchDallas Ft Wrth Cler

Pay Plan	Pay Table	Description
GS	0119	Spec. Sch Chicago Clericals
GS	0137	Actuary – Multiple Areas
GS	0157	Spec. Sch East MA Acct/Aud
GS	0158	Spec. Sch Conn. Acct/Aud
GS	0159	Spec. Sch Juneau Clericals
GS	0164	Spec. Sch DC Metro Acct/Aud
GS	0165	Spec. Sch SF Bay Acct/Aud
GS	0173	Spec. Sch Albuquerque Nurse
GS	0220	Spec. Sch Johnston Island
GS	0263	Spec. Sch Chicago Acct./Aud
GS	0268	Spec. SchSF/OKLD Realty Spec
GS	0290	Spec. Sch Medical Officer
GS	0304	Spec. Sch DC MSA Nurse
GS	0305	Spec. Sch Indus. Hygienist
GS	0329	Spec. Sch NY City Civil Eng
GS	0331	Spec. SchDupage Cty-Pat. Att
GS	0349	Spec. SchLos Alamos Clerical
GS	0367	Spec. SchChicago Realty Spec
GS	0414	Spec. Sch Engineers
GS	0415	Spec. Sch Petroleum Eng.
GS	0422	Spec. SchEngineer/Electrical
GS	0485	Spec. Sch Alameda-Pat. Att.
GS	0491	Spec. SchLaw Enforcement Off
GS	0499	Spec. Sch Medical Officer
GS	0504	Spec. Sch Amarillo Clerical
GS	999A	Info Tech - Outside 48 States
GS	999B	Info Tech - Various Locations
GS	999C	Info Tech - Various Locations
GS	999D	Info Tech - Various Locations
GS	999E	Info Tech - Various Locations
GS	999F	Info Tech - SF, OK, San Jose
SL	0000	Senior Level - SL
ST	0000	Scientific & Professional
WB	SPA1	Snettisham WB Employees
WB	SWBC	SWAPA - Wage Board
WB	SWBD	SWAPA - Wage Board
WB	SWCA	SWAPA - Wage Board
WB	SWCB	SWAPA - Wage Board
WB	SWCC	SWAPA - Wage Board
WB	SWDB	SWAPA - Wage Board
WB	SWEA	SWAPA - Wage Board

Pay Plan	Pay Table	Description
WB	SWEM	SWAPA - Wage Board
WB	SWFE	SWAPA - Wage Board
WB	SWGA	SWAPA - Wage Board
WB	SWGB	SWAPA - Wage Board
WB	SWGC	SWAPA - Wage Board
WB	SWHA	SWAPA - Wage Board
WB	SWJA	SWAPA - Wage Board
WB	SWJB	SWAPA - Wage Board
WB	SWJC	SWAPA - Wage Board
WB	SWKA	SWAPA - Wage Board
WB	SWLA	SWAPA - Wage Board
WB	SWMA	SWAPA - Wage Board
WB	SWOA	SWAPA - Wage Board
WB	WPAB	WAPA - Wage Board
WB	WPAE	WAPA - Wage Board
WB	WPAL	WAPA - Wage Board
WB	WPAM	WAPA - Wage Board
WB	WPAN	WAPA - Wage Board
WB	WPAO	WAPA - Wage Board
WB	WPAP	WAPA - Wage Board
WB	WPAQ	WAPA - Wage Board
WB	WPAR	WAPA - Wage Board
WB	WPAS	WAPA - Wage Board
WB	WPAT	WAPA - Wage Board
WB	WPAU	WAPA - Wage Board
WB	WPAV	WAPA - Wage Board
WB	WPAW	WAPA - Wage Board
WB	WPAX	WAPA - Wage Board
WB	WPAY	WAPA - Wage Board
WB	WPAZ	WAPA - Wage Board
WB	WPBA	WAPA - Wage Board
WB	WPBB	WAPA - Wage Board
WB	WPBC	WAPA - Wage Board
WB	WPBD	WAPA - Wage Board
WB	WPBH	WAPA - Wage Board
WB	WPBI	WAPA - Wage Board
WB	WPBJ	WAPA - Wage Board
WB	WPBK	WAPA - Wage Board
WB	WPBL	WAPA - Wage Board
WB	WPBM	WAPA - Wage Board
WB	WPBN	WAPA - Wage Board
WB	WPBO	WAPA - Wage Board
WB	WPBP	WAPA - Wage Board
WB	WPBQ	WAPA - Wage Board
09/05/		14.4-2

Pay Plan	Pay Table	Description
WB	WPBR	WAPA - Wage Board
WB	WPBS	WAPA - Wage Board
WB	WPBT	WAPA - Wage Board
WB	WPBU	WAPA - Wage Board
WB	WPBV	WAPA - Wage Board
WB	WPCA	WAPA - Wage Board
WB	WPCB	WAPA - Wage Board
WB	WPCD	WAPA - Wage Board
WB	WPCE	WAPA - Wage Board
WB	WPCG	WAPA - Wage Board
WB	WPCH	WAPA - Wage Board
WB	WPCI	WAPA - Wage Board
WB	WPCJ	WAPA - Wage Board
WB	WPCK	WAPA - Wage Board
WB	WPCL	WAPA - Wage Board
WB	WPCN	WAPA - Wage Board
WB	WPCP	WAPA - Wage Board
WB	WPCQ	WAPA - Wage Board
WB	WPCR	WAPA - Wage Board
WB	WPCS	WAPA - Wage Board
WB	WPCV	WAPA - Wage Board
WB	WPCW	WAPA - Wage Board
WB	WPCX	WAPA - Wage Board
WB	WPCY	WAPA - Wage Board
WB	WPCZ	WAPA - Wage Board
WB	WPDA	WAPA - Wage Board
WB	WPDB	WAPA - Wage Board
WB	WPDC	WAPA - Wage Board
WB	WPDE	WAPA - Wage Board
WB	WPDG	WAPA - Wage Board
WB	WPDI	WAPA - Wage Board
WB	WPDK	WAPA - Wage Board
WB	WPDL	WAPA - Wage Board
WB	WPDM	WAPA - Wage Board
WB	WPDN	WAPA - Wage Board
WB	WPDP	WAPA - Wage Board
WB	WPDQ	WAPA - Wage Board
WB	WPDR	WAPA - Wage Board
WB	WPDS	WAPA - Wage Board
WB	WPFA	WAPA - Wage Board
WB	WPFB	WAPA - Wage Board
WB	WPFC	WAPA - Wage Board
WB	WPFD	WAPA - Wage Board
WB	WPFH	WAPA - Wage Board

Pay Plan	Pay Table	Description
WB	WPFJ	WAPA - Wage Board
WB	WPFK	WAPA - Wage Board
WB	WPFL	WAPA - Wage Board
WB	WPFM	WAPA - Wage Board
WB	WPFN	WAPA - Wage Board
WB	WPFO	WAPA - Wage Board
WB	WPFP	WAPA - Wage Board
WB	WPFQ	WAPA - Wage Board
WB	WPFR	WAPA - Wage Board
WB	WPFS	WAPA - Wage Board
WB	WPFT	WAPA - Wage Board
WB	WPFU	WAPA - Wage Board
WB	WPGA	WAPA - Wage Board
WB	WPGB	WAPA - Wage Board
WB	WPGC	WAPA - Wage Board
WB	WPGD	WAPA - Wage Board
WB	WPGE	WAPA - Wage Board
WB	WPGF	WAPA - Wage Board
WB	WPGG	WAPA - Wage Board
WB	WPGI	WAPA - Wage Board
WB	WPHA	WAPA - Wage Board
WB	WPHB	WAPA - Wage Board
WB	WPHC	WAPA - Wage Board
WB	WPHD	WAPA - Wage Board
WB	WPHE	WAPA - Wage Board
WB	WPHF	WAPA - Wage Board
WB	WPHG	WAPA - Wage Board
WB	WPHH	WAPA - Wage Board
WB	WPHI	WAPA - Wage Board
WB	WPHJ	WAPA - Wage Board
WB	WPHL	WAPA - Wage Board
WB	WPHM	WAPA - Wage Board
WB	WPHN	WAPA - Wage Board
WB	WPHO	WAPA - Wage Board
WB	WPHP	WAPA - Wage Board
WB	WPHQ	WAPA - Wage Board
WB	WPHR	WAPA - Wage Board
WB	WPHS	WAPA - Wage Board
WB	WPHT	WAPA - Wage Board
WB	WPHU	WAPA - Wage Board
WB	WPHV	WAPA - Wage Board
WB	WPHW	WAPA - Wage Board
WB	WPHX	WAPA - Wage Board
WB	WPHY	WAPA - Wage Board
09/05/	.02	14 4-3

Pay Plan	Pay Table	Description
WB	WPHZ	WAPA - Wage Board
WB	WPIB	WAPA - Wage Board
WB	WPIC	WAPA - Wage Board
WB	WPID	WAPA - Wage Board
WB	WPIE	WAPA - Wage Board
WB	WPIF	WAPA - Wage Board
WB	WPIG	WAPA - Wage Board
WB	WPIH	WAPA - Wage Board
WB	WPII	WAPA - Wage Board
WB	WPIJ	WAPA - Wage Board
WB	WPIK	WAPA - Wage Board
WB	WPIL	WAPA - Wage Board
WB	WPIM	WAPA - Wage Board
WB	WPIN	WAPA - Wage Board
WB	WPIO	WAPA - Wage Board
WB	WPIP	WAPA - Wage Board
WB	WPIQ	WAPA - Wage Board
WB	WPIR	WAPA - Wage Board
WB	WPIS	WAPA - Wage Board
WB	WPIT	WAPA - Wage Board
WB	WPIU	WAPA - Wage Board
WB	WPIV	WAPA - Wage Board
WB	WPIW	WAPA - Wage Board
WB	WPIX	WAPA - Wage Board
WB	WPIY	WAPA - Wage Board
WB	WPIZ	WAPA - Wage Board
WB	WPJA	WAPA - Wage Board
WB	WPJB	WAPA - Wage Board
WB	WPJC	WAPA - Wage Board
WB	WPJD	WAPA - Wage Board
WB	WPJE	WAPA - Wage Board
WB	WPJF	WAPA - Wage Board
WB	WPJG	WAPA - Wage Board
WB	WPJH	WAPA - Wage Board
WB	WPJI	WAPA - Wage Board
WB	WPJJ	WAPA - Wage Board
WB	WPJK	WAPA - Wage Board
WB	WPJL	WAPA - Wage Board
WB	WPJM	WAPA - Wage Board
WB	WPJN	WAPA - Wage Board
WB	WPJO	WAPA - Wage Board
WB	WPJP	WAPA - Wage Board
WB	WPJQ	WAPA - Wage Board
WB	WPJR	WAPA - Wage Board

Pay Plan	Pay Table	Description
WB	WPJS	WAPA - Wage Board
WB	WPJT	WAPA - Wage Board
WB	WPJU	WAPA - Wage Board
WB	WPJV	WAPA - Wage Board
WB	WPJW	WAPA - Wage Board
WB	WPJX	WAPA - Wage Board
WB	WPJY	WAPA - Wage Board
WB	WPJZ	WAPA - Wage Board
WB	WPKA	WAPA - Wage Board
WB	WPKB	WAPA - Wage Board
WB	WPKC	WAPA - Wage Board
WB	WPKD	WAPA - Wage Board
WB	WPKE	WAPA - Wage Board
WB	WPKF	WAPA - Wage Board
WB	WPKG	WAPA - Wage Board
WB	WPKH	WAPA - Wage Board
WB	WPKI	WAPA - Wage Board
WB	WPKJ	WAPA - Wage Board
WB	WPKK	WAPA - Wage Board
WB	WPKL	WAPA - Wage Board
WB	WPKM	WAPA - Wage Board
WB	WPKN	WAPA - Wage Board
WB	WPKO	WAPA - Wage Board
WB	WPKR	WAPA - Wage Board
WB	WPKS	WAPA - Wage Board
WB	WPKT	WAPA - Wage Board
WB	WPKU	WAPA - Wage Board
WB	WPKV	WAPA - Wage Board
WB	WPKW	WAPA - Wage Board
WB	WPKX	WAPA - Wage Board
WB	WPKY	WAPA - Wage Board
WB	WPKZ	WAPA - Wage Board
WB	WPLE	WAPA - Wage Board
WB	WPLF	WAPA - Wage Board
WB	WPLG	WAPA - Wage Board
WB	WPLH	WAPA - Wage Board
WB	WPLI	WAPA - Wage Board
WB	WPLJ	WAPA - Wage Board
WB	WPLK	WAPA - Wage Board
WB	WPLL	WAPA - Wage Board
WB	WPLM	WAPA - Wage Board
WB	WPLN	WAPA - Wage Board
WB	WPLO	WAPA - Wage Board
WB	WPLP	WAPA - Wage Board
09/05/	1	14 4-4

Pay Plan	Pay Table	Description
WB	WPLQ	WAPA - Wage Board
WB	WPLR	WAPA - Wage Board
WB	WPLS	WAPA - Wage Board
WB	WPLT	WAPA - Wage Board
WB	WPLU	WAPA - Wage Board
WB	WPLV	WAPA - Wage Board
WB	WPLW	WAPA - Wage Board
WB	WPLX	WAPA - Wage Board
WB	WPLY	WAPA - Wage Board
WB	WPLZ	WAPA - Wage Board
WB	WPMA	WAPA - Wage Board
WB	WPMB	WAPA - Wage Board
WB	WPMC	WAPA - Wage Board
WB	WPMD	WAPA - Wage Board
WB	WPME	WAPA - Wage Board
WB	WPMF	WAPA - Wage Board
WB	WPMG	WAPA - Wage Board
WB	WPMH	WAPA - Wage Board
WB	WPMI	WAPA – Wage Board
WB	WPMJ	WAPA – Wage Board
WB	WPMK	WAPA - Wage Board
WB	WPML	WAPA – Wage Board
WB	WPOB	WAPA - Wage Board
WB	WPOC	WAPA - Wage Board
WB	WPOF	WAPA - Wage Board
WB	WPOI	WAPA - Wage Board
WB	WPOK	WAPA - Wage Board
WB	WPOL	WAPA - Wage Board
WB	WPOM	WAPA - Wage Board
WB	WPON	WAPA - Wage Board
WB	WPOO	WAPA - Wage Board
WB	WPOP	WAPA - Wage Board
WB	WPOQ	WAPA - Wage Board
WB	WPOR	WAPA - Wage Board
WB	WPOS	WAPA - Wage Board
WB	WPOT	WAPA - Wage Board
WB	WPOV	WAPA - Wage Board
WB	WPOW	WAPA - Wage Board
WB	WPOX	WAPA - Wage Board
WB	WPOY	WAPA - Wage Board
WB	WPOZ	WAPA - Wage Board
WB	WPPA	WAPA - Wage Board
WB	WPPB	WAPA - Wage Board
WB	WPPC	WAPA - Wage Board

Pay Plan	Pay Table	Description
WB	WPPD	WAPA - Wage Board
WB	WPPE	WAPA - Wage Board
WB	WPPF	WAPA - Wage Board
WB	WPPG	WAPA - Wage Board
WB	WPPH	WAPA - Wage Board
WB	WPPI	WAPA - Wage Board
WB	WPPJ	WAPA - Wage Board
WB	WPPK	WAPA - Wage Board
WB	WPPN	WAPA - Wage Board
WB	WPPP	WAPA - Wage Board
WB	WPPQ	WAPA - Wage Board
WB	WPPR	WAPA - Wage Board
WB	WPPS	WAPA - Wage Board
WB	WPPT	WAPA - Wage Board
WB	WPPU	WAPA - Wage Board
WB	WPPV	WAPA - Wage Board
WB	WPPW	WAPA - Wage Board
WB	WPPX	WAPA - Wage Board
WB	WPPY	WAPA - Wage Board
WB	WPPZ	WAPA - Wage Board
WB	WPQA	<u> </u>
	_ `	WAPA - Wage Board
WB	WPQB	WAPA - Wage Board
WB	WPQC	WAPA - Wage Board
WB	WPQD	WAPA - Wage Board
WB	WPQE	WAPA - Wage Board
WB	WPQF	WAPA - Wage Board
WB	WPQG	WAPA - Wage Board
WB	WPQH	WAPA - Wage Board
WB	WPQJ	WAPA - Wage Board
WB	WPQK	WAPA - Wage Board
WB	WPQL	WAPA - Wage Board
WB	WPQM	WAPA - Wage Board
WB	WPQN	WAPA - Wage Board
WB	WPQO	WAPA - Wage Board
WB	WPQP	WAPA - Wage Board
WB	WPQQ	WAPA - Wage Board
WB	WPQR	WAPA - Wage Board
WB	WPQS	WAPA - Wage Board
WB	WPQT	WAPA - Wage Board
WB	WPQU	WAPA - Wage Board
WB	WPQV	WAPA - Wage Board
WB	WPQW	WAPA - Wage Board
WB	WPQX	WAPA - Wage Board
WB	WPQY	WAPA - Wage Board
09/05/	02	14 4-5

Plan Table	
WB WPQZ WAPA - Wage Board	
WB WPRA WAPA - Wage Board	
WB WPRB WAPA - Wage Board	
WB WPRC WAPA - Wage Board	
WB WPRD WAPA - Wage Board	
WB WPRF WAPA - Wage Board	
WB WPRG WAPA - Wage Board	
WB WPRH WAPA - Wage Board	
WB WPRI WAPA - Wage Board	
WB WPRJ WAPA - Wage Board	
WB WPRK WAPA - Wage Board	
WB WPRL WAPA - Wage Board	
WB WPRM WAPA - Wage Board	
WB WPRN WAPA - Wage Board	
WB WPRO WAPA - Wage Board	
WB WPRP WAPA - Wage Board	
WB WPRQ WAPA - Wage Board	
WB WPRR WAPA - Wage Board	
WB WPRS WAPA - Wage Board	
WB WPRT WAPA - Wage Board	
WB WPRU WAPA - Wage Board	
WB WPRV WAPA - Wage Board	
WB WPRW WAPA - Wage Board	
WB WPRX WAPA - Wage Board	
WB WPRY WAPA - Wage Board	
WB WPRZ WAPA - Wage Board	
WB WPSA WAPA - Wage Board	
WB WPSB WAPA - Wage Board	
WB WPSC WAPA - Wage Board	
WB WPSF WAPA - Wage Board	
WB WPSG WAPA - Wage Board	
WB WPSH WAPA - Wage Board	
WB WPSI WAPA - Wage Board	
WB WPSJ WAPA - Wage Board	
WB WPSK WAPA - Wage Board	
WB WPSL WAPA - Wage Board	
WB WPSM WAPA - Wage Board	
WB WPSN WAPA - Wage Board	
WB WPSO WAPA - Wage Board	
WB WPSP WAPA - Wage Board	
WB WPSQ WAPA - Wage Board	
WB WPSR WAPA - Wage Board	
WB WPSS WAPA - Wage Board	
WB WPST WAPA - Wage Board	

Pay Plan	Pay Table	Description
WB	WPSU	WAPA - Wage Board
WB	WPSV	WAPA - Wage Board
WB	WPSW	WAPA - Wage Board
WB	WPSX	WAPA - Wage Board
WB	WPSY	WAPA - Wage Board
WB	WPSZ	WAPA - Wage Board
WB	WPTA	WAPA - Wage Board
WB	WPTB	WAPA - Wage Board
WB	WPTC	WAPA - Wage Board
WB	WPTD	WAPA - Wage Board
WB	WPTE	WAPA - Wage Board
WB	WPTF	WAPA - Wage Board
WB	WPTG	WAPA - Wage Board
WB	WPUE	WAPA - Wage Board
WB	WPUF	WAPA - Wage Board
WB	WPUL	WAPA - Wage Board
WB	WPUM	WAPA - Wage Board
WB	WPUN	WAPA - Wage Board
WB	WPUO	WAPA - Wage Board
WB	WPUP	WAPA - Wage Board
WB	WPUQ	WAPA - Wage Board
WB	WPUR	WAPA - Wage Board
WB	WPUS	WAPA - Wage Board
WB	WPUT	WAPA - Wage Board
WB	WPUU	WAPA - Wage Board
WB	WPUV	WAPA - Wage Board
WB	WPUW	WAPA - Wage Board
WB	WPUX	WAPA - Wage Board
WB	WPUY	WAPA - Wage Board
WB	WPUZ	WAPA - Wage Board
WB	WPVA	WAPA - Wage Board
WB	WPVB	WAPA - Wage Board
WB	WPVC	WAPA - Wage Board
WB	WPVD	WAPA - Wage Board
WB	WPVE	WAPA - Wage Board
WB	WPVF	WAPA - Wage Board
WB	WPVG	WAPA - Wage Board
WB	WPVH	WAPA - Wage Board
WB	WPVI	WAPA - Wage Board
WB	WPVJ	WAPA - Wage Board
WB	WPVL	WAPA - Wage Board
WB	WPVN	WAPA - Wage Board
WB	WPVO	WAPA - Wage Board
WB	WPVP	WAPA - Wage Board
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Pay Plan	Pay Table	Description
WB	WPVQ	WAPA - Wage Board
WB	WPVR	WAPA - Wage Board
WB	WPVS	WAPA - Wage Board
WB	WPVT	WAPA - Wage Board
WB	WPVU	WAPA - Wage Board
WB	WPVV	WAPA - Wage Board
WB	WPVW	WAPA - Wage Board
WB	WPVX	WAPA - Wage Board
WB	WPVY	WAPA - Wage Board
WB	WPVZ	WAPA - Wage Board
WB	WPWA	WAPA - Wage Board
WB	WPWB	WAPA - Wage Board
WB	WPWC	WAPA - Wage Board
WB	WPWD	WAPA - Wage Board
WB	WPWF	WAPA - Wage Board
WB	WPWI	WAPA - Wage Board
WB	WPWK	WAPA - Wage Board
WB	WPWL	WAPA - Wage Board
WB	WPWM	WAPA - Wage Board
WB	WPWN	WAPA - Wage Board
WB	WPWO	WAPA - Wage Board
WB	WPWP	WAPA - Wage Board
WB	WPWQ	WAPA - Wage Board
WB	WPWR	WAPA - Wage Board
WB	WPWS	WAPA - Wage Board
WB	WPWT	WAPA - Wage Board
WB	WPWU	WAPA - Wage Board
WB	WPWV	WAPA - Wage Board
WB	WPWW	WAPA - Wage Board
WB	WPWX	WAPA - Wage Board
WB	WPWY	WAPA - Wage Board
WB	WPWZ	WAPA - Wage Board
WB	WPXB	WAPA - Wage Board
WB	WPXD	WAPA - Wage Board
WB	WPXE	WAPA - Wage Board
WB	WPXF	WAPA - Wage Board
WB	WPXG	WAPA - Wage Board
WB	WPXH	WAPA - Wage Board
WB	WPXI	WAPA - Wage Board
WB	WPXJ	WAPA - Wage Board
WB	WPXK	WAPA - Wage Board
WB	WPXL	WAPA - Wage Board
WB	WPXM	WAPA - Wage Board
WB	WPXN	WAPA - Wage Board

Pay	Pay	Description
Plan	Table	•
WB	WPXO	WAPA - Wage Board
WB	WPXP	WAPA - Wage Board
WB	WPXQ	WAPA - Wage Board
WB	WPXR	WAPA - Wage Board
WB	WPXS	WAPA - Wage Board
WB	WPXT	WAPA - Wage Board
WB	WPXU	WAPA - Wage Board
WB	WPXV	WAPA - Wage Board
WB	WPXW	WAPA - Wage Board
WB	WPXX	WAPA - Wage Board
WB	WPXY	WAPA - Wage Board
WB	WPYB	WAPA - Wage Board
WB	WPYC	WAPA - Wage Board
WB	WPYD	WAPA - Wage Board
WB	WPYE	WAPA - Wage Board
WB	WPYF	WAPA - Wage Board
WB	WPYG	WAPA - Wage Board
WB	WPYH	WAPA - Wage Board
WB	WPYI	WAPA - Wage Board
WB	WPYJ	WAPA - Wage Board
WB	WPYK	WAPA - Wage Board
WB	WPYL	WAPA - Wage Board
WB	WPYM	WAPA - Wage Board
WB	WPYN	WAPA - Wage Board
WB	WPYO	WAPA - Wage Board
WB	WPYP	WAPA - Wage Board
WB	WPYQ	WAPA - Wage Board
WB	WPYR	WAPA - Wage Board
WB	WPYS	WAPA - Wage Board
WB	WPYT	WAPA - Wage Board
WB	WPYU	WAPA - Wage Board
WB	WPYV	WAPA - Wage Board
WB	WPYW	WAPA - Wage Board
WB	WPYX	WAPA - Wage Board
WB	WPYY	WAPA - Wage Board
WB	WPYZ	WAPA - Wage Board
WB	WPZA	WAPA - Wage Board
WG	0027	Wage Grade - DC Metro Area
WG	0094	Wage Grade - NY City, NY
WG	0113	Wage Grade - Albany, OR
WG	0125	Wage Grade - Nashville, TN
WG	WPBT	WAPA - Wage Board
WG	WPKE	WAPA - Wage Board
WL	0027	Wage Leader - DC Metro Area
	1	

Pay Plan	Pay Table	Description
WL	0094	Wage Leader - NY City, NY
WL	0113	Wage Leader - Albany, OR
WL	0125	Wage Leader - Nashville, TN
WS	0027	Wage Supv DC Metro Area
WS	0094	Wage Supv NY City, NY
WS	0113	Wage Grade - Albany, OR
WS	0125	Wage Supv Nashville, TN
ZZ	0000	Consultant (Without Comp.)

## 14.5 PAR Remarks

#### Appointment Limitations (Axx)

- A01 Appointment is on a seasonal basis; the employee is subject to release to nonpay status and recall to duty to meet workload requirements as a condition of employment in accordance with the attached agreement.
- A03 This appointment is intended to continue for 2 years. Upon satisfactory completion of 2-year trial period, you will be noncompetitively converted to career-conditional appointment. If performance is not satisfactory, or you fail to satisfactorily complete program, employment will be terminated.
- A04 Appointment is NTE 2 years. Upon satisfactory completion of internship, you may be noncompetitively converted to career or career conditional appointment. If your performance is not satisfactory or if you fail to satisfactorily complete internship, employment will be terminated.
- A07 Employment under this appointment must not exceed (number) hours a year.
- A08 Employment under this and previous appointment must not exceed (number) hours a year.
- A11 Employment under this appointment must not exceed \*\*\*\* working days a year.
- A12 Employment under this and previous appointment must not exceed \*\*\*\* working days a year.
- A15 Total compensation during service year may not exceed 40% of salary for GS-3/1; salary increase resulting from a within-grade increase will not count against this limitation.
- As a reemployed annuitant, you serve at the will of the appointing officer.
- A21 Temporary employees serve under appointments limited to 1-year or less and are subject to termination at any time without use of adverse action or reduction-in-force procedures. A temporary appointment does not confer eligibility to be promoted or reassigned to other positions, or the ability to be noncompetitively converted to career-conditional appointment.
- A22 This appointment cannot be renewed. Upon admission to the Bar, you will be eligible for appointment as attorney in accordance with \*\*\*\*\*\*\*\* appointment procedures.
- Employee informed in advance of the conditions of appointment under the Presidential Management Intern Program.
- A25 This action provides relief required by Public Law 101-12, pending final decision of the MSPB.
- A30 This appointment does not confer eligibility to be noncompetitively converted to career-conditional or career appointment.
- A31 This appointment is intended to continue through completion of education and study-related work requirements. An agency may noncompetitively appoint you to a career or career-conditional appointment within 120 days after satisfactory completion of your educational program and satisfactory completion of at least 640 hours of career-related work experience. The work experience must have been completed prior to or concurrently with the completion of the requirements of your educational program.

## Benefits & Leave (Bxx)

B01	Cancelled health benefits.
B02	Elected not to enroll for health benefits.
В03	Ineligible for health benefits.
B04	Ineligible for leave.
B31	Changes SCD from **-** to reflect **** days worked under intermittent work schedule.
B32	Changes SCD from **-** to reflect excess time in nonpay status during calendar year ****.
B33	Changes SCD from **-** to reflect service which has been ruled creditable.
B34	Changes SCD from **-** to reflect previously unclaimed service.
B35	Changes SCD from **-** because *******.
B36	Changes SCD from **-** upon employee's receipt of discharge from uniformed service.
B41	Health benefits coverage will continue as long as you participate in the work-study program if you pay the employee's share of costs. Payment should be made to agency, either when you return to duty or during your nonpay status.
B43	Government share of premium for health benefits coverage will be reduced because you are working part-time. You will have to pay the employee share of the premium plus the difference between what the Government pays for your enrollment and the amount the Government pays for a full-time employee.
B44	Health benefits coverage continues.
B45	You may change your health benefits enrollment within 60 days after the effective date of this action.
B46	SF-2819 was provided. Life insurance coverage is extended for 31 days during which you are eligible to convert to an individual policy (nongroup contract).
B47	Health benefits coverage is extended for 31 days during which you are eligible to convert to an individual policy (nongroup contract).
B51	Basic Life insurance coverage and Additional Optional coverage (if elected) are based on the rate of annual salary payable to you as a part-time employee, not the full-time salary rate shown in Block 20 of this SF-50. However, Basic Life insurance coverage is always at least \$10,000.
B52	Ineligible for health benefits until you complete one year of current continuous employment. Then you may elect health benefits for which you will be charged the full premium.
B53	Health benefits coverage is extended for 31 days during which you are eligible to convert to an individual policy (nongroup contract). You are also eligible for temporary continuation of your FEHB coverage for up to 18 months.

Eligible to elect coverage under the Federal Employees Retirement System (FERS) within six months of B60 the effective date of this personnel action. SF-3109 provided to employee. You appear to be eligible for early deferred retirement benefits at age \*\*\*\*. If you have questions, con-B61 tact your agency retirement counselor. You appear to be eligible for immediate MRA + 10 retirement annuity. If you have questions, contact B62 your agency retirement counselor. B63 Elected to retain coverage under a retirement system for NAF employees. **B66** Health benefits coverage will continue for 18 months unless you elect to cancel coverage. You are liable for the employee share of the premiums for the first 365 days and for 102% of the full subscription charge after 365 days. Payment for coverage after 365 days must be made on a current basis; payment for the first 365 days may be made while you are absent or when you return. Elected Full Living Benefits on \*\*-\*\*. Post-election Basic Insurance Amount is \$00.00. B67 Elected Partial Living Benefits on \*\*\_\*\*. Post-election Basic Insurance Amount is \$\*\*.\*\*. Must B68 elect "no reduction" at retirement. B69 Employee has assigned ownership of life insurance coverage. Assignment terminates 31 days after separation date unless employee is entitled to continued coverage before that date. B71 You must elect to either: (1) terminate your enrollment, or (2) continue it for up to 365 days and agree to pay the premium or incur a debt. If you do not elect to terminate or continue your enrollment, it automatically terminates at the end of the last pay period in which you paid premiums. Contact your servicing Human Resources Office or see FEHB Handbook at http://www.opm.gov/insure for detailed information. B72 FEGLI coverage continues until your time in nonpay status totals 12 months. Contact your servicing Human Resources Office or see the FEGLI Handbook at http://www.opm.gov/insure for detailed information Corrections & Cancellations (Cxx) Employee found to be ineligible for \*\*\*\* retirement. C02

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Retroactive restoration based on \*\*\*\*\*\*\*\*.

Retroactive change to intermediate grade based on \*\*\*\*\*\*\*\*.

Also corrects same item(s) on personnel action \*\*\*\* \*\*\*\*\*\*\* dated \*\*-\*\*-\*\*.

Also corrects \*\*\*\* \*\*\*\*\*\* effective \*\*-\*\*, item \*\*\*, to add \*\*\*\*\*\*\*.

Retroactive change to former grade based on \*\*\*\*\*\*\*\*.

Retroactive change to lower grade based on \*\*\*\*\*\*\*\*.

C03

C04

C06

C07

C08

C09

C10	Corrects date of separation from **-**-** to avoid a break in service when employee was appointed by ********.
C11	Corrects item **** from ********.
C12	Also corrects same item(s) on all previous actions from **-**-** to **-**-**.
C13	Also corrects **** ****** effective **-**, item ***, from *******.
C14	*******
C15	This notification of personnel action replaces a previously executed one.
C16	This notification of personnel action prepared by *******.
C17	Completes item **** which was omitted.
C18	Corrects item **** to read:
C19	Corrects salary to give employee benefit of higher previous rate of basic pay.
C20	Action cancelled in accordance with OPM letter (or instructions) dated **-**-**. This SF-50 and the SF-50 being cancelled must be retained permanently in the employee's Official Personnel Folder.
C21	Service from **-**-** to **-**-** may be credited for qualification purposes, and for leave accrual and RIF retention purposes, and for *********.
C27	Entitled to back pay under 5 U.S.C. 5596.
C28	Active duty begins **-**-**.

## **Employment Conditions (Exx)**

C30

E01	Appointment is indefinite.
E03	Trial period completed.
E04	Initial probationary period completed.
E05	Date for completion of initial probationary (or trial) period has been adjusted to reflect excess time in nonpay status. New completion date is **-**-**.
E06	Date for completion of probationary (or trial) period has been adjusted to reflect credit for service on intermittent work schedule. Estimated completion date is **-**-**.
E07	You will be in tenure group II until you complete the one-year probationary period that began **-**; then you will be changed back to tenure group I.

Nature of action and code shown on original action are no longer in use.

E18

G33

E19	Appointment is subject to completion of one year trial period beginning **-**.
E21	You are subject to regulations governing conduct and responsibilities of special government employees.
E23	Veteran preference is not applicable to the Senior Executive Service.
E24	Probationary period for SES position is not required.
E25	Subject to satisfactory completion of one year SES probationary period beginning **-**-**.
E37	Satisfactorily completed prescribed training under training agreement. Meets basic qualifications for other positions in this series.
E39	Employee is assigned to worker-trainee developmental position.
E44	Probationary period for supervisory (or managerial) position not required.
E45	Probationary period for supervisory (or managerial) position completed.
E46	Subject to completion of ******** probationary period for assignment to supervisory (or managerial) position beginning **_**.
E51	Employee was guaranteed placement rights during probation.
E54	Employee elects to continue appropriate SES provisions under 5 U.S.C. 3392(c).
E56	Qualified for this position only under training agreement. Not eligible for other positions in this series until satisfactorily completes prescribed training.
E58	Appointment is on a provisional basis. You are eligible for retirement coverage and for health benefits and life insurance. If your performance is satisfactory, and you meet all legal, qualifications, and other applicable requirements, you may be converted to a nontemporary appointment before this appointment expires.
<u>Service</u>	Credit (Gxx)
G11	Employee paid under 5 U.S.C. Chapter 81 from **-**-** through **-**-**. The entire period shall be credited for all rights and benefits based on length of service.
G29	Intermittent employment totaled **** hours in work status from **-**-** to **-**-**.
G30	Intermittent employment totaled **** hours in pay status from **-**-** to **-**-**.
G31	Nonpay time not previously recorded in calendar year **** totaled **** hours.

Service credit for retirement, reduction-in-force, and leave accrual purposes continues for up to a maxi-

Appointment is subject to completion of one year initial probationary period beginning \*\*-\*\*-\*\*.

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mum of 6 months in nonpay status per calendar year.

### Position Change Actions (Kxx)

K01	Qualification requirements modified because of general OPM amendment.
K02	Qualifications waived per Reg 351.703.
K12	Selected from *********, dated **-**.
K13	Removes temporary limitation placed on the last action.
K16	From promotion NTE **-**.
K17	Repromotion to grade not above that from which down-graded without personal cause and not at employee's request.
K18	Position is at the full performance level.
K19	Successor position employee retained in competitive service.
K20	Full performance level of employee's position is *******.
K23	Result of change in classification standards.
K26	Result of additional duties and responsibilities.
K27	Result of position review.
K38	Promoted (or reassigned) from ********, effective **-**-**.
K43	Result of failure to satisfactorily complete probationary period for supervisory (or managerial) position.
K50	From position change NTE **-**.
K55	Based on OPM CEG letter of 9/29/92.
K60	Action is in lieu of RIF separation of employee retained under temporary exception.

### Miscellaneous (Mxx)

M01	Appointment affidavit executed **-**-
M02	You have reemployment rights for two years in ******** granted under Reg 352.204 and OPM letter of **-**-**.
M04	Under Public Law 96-8, is entitled to continue FEGLI and health benefits. Has reemployment rights in ******** or successor agency upon separation from the Institute, subject to such time period and other conditions as the President may prescribe.
M06	Reason for temporary appointment ********

M10	OPF maintained by ********.
M20	Action at employee's request.
M23	Continues promotion NTE **-**-**.
M24	Continues position change NTE **-**.
M26	Employee was advised of opportunity to file grievance and elected to do so.
M27	Employee was advised of opportunity to file grievance and elected not to do so.
M33	On nonpay status in ********.
M34	On part-time (or intermittent) appointment in *******.
M36	Concurrent employment ********.
M38	Frozen service: *********
M39	Creditable military service: ********.
M40	Previous retirement coverage: ********.
M42	Approved by ******** on **-**-**.
M44	Employee elected coverage under FERS.
M45	Employee is automatically covered under FERS.
M46	Employee is covered by FERS because of previous election.
M52	Employee declined conversion to the Senior Executive Service and continues under ******* with all associated rights and benefits.
M53	Employee to suffer no loss of, or reduction in, pay, leave, credit for time or service, or performance or efficiency rating.
M58	No SES reinstatement rights.
M60	Information on possible 5 U.S.C. Chapter 83, Subchapter II, case may be obtained from ********.
M61	Possible 5 U.S.C. Chapter 83, Subchapter II, case.
M62	You have reemployment rights in ******** under 5 U.S.C. 3582 provided separation is no later than ******* after the date of entry on duty in ******* and you apply to this agency within 90 days from date of your separation.
M64	You have employment rights in ******** for **** under *******.
M67	Forwarding address:

M71	Reason for placement in nonpay status:
M72	Reason for furlough: ********.
M73	To be furloughed on **-**- for total of **** hours.
M74	Changes data element(s) in block(s) ********.
M76	Requested, in lieu of annual leave, after declining offer of ********.
M80	Variation under CS Rule 5 approved by OPM on **-**.
M81	Code S in Block 32 indicates a part-time employee who is job sharing.
M82	Code T in Block 32 indicates a seasonal employee, with a part-time work schedule, who is job sharing.
M83	The 3-year limit on eligibility for reinstatement is extended by the period you serve on excepted, SES, term, or temporary appointment.
M85	You are scheduled to work a minimum of **** hours per week; additional hours may be scheduled when needed to complete assignments.
M90	Employee retained, on accrued annual leave NTE **-**, past RIF separation date of **-**-** to establish eligibility for ********.
M91	Employee retained on sick leave past RIF separation date of **-**-
M92	Employee retained past RIF effective date of **-**-** to ********.
M93	Employee retained under authority of liquidation provisions prior to completion of liquidation on RIF separation date of **-**-**.
M94	Employee elected deemed FERS coverage under 5 CFR 846.204(b)(2)(i) on (insert date employee made the election).
M95	Employee given deemed FERS election notice on (insert date of notice), and did not respond. Employee is deemed to have elected FERS coverage under 5 CFR 846.204(b)(2)(i).
M96	Employee declined FERS coverage under 5 CFR 846.204(b)(2)(ii) on (insert date employee made the election).
M97	"SES member subject to post-employment restrictions under 18 U.S.C. 207(c)."

### Pay in Addition to, or Outside of Salary (Nxx)

- N10 To (or expected to) be paid under 5 U.S.C. Chapter 81.
- N11 Employee is entitled to 45 calendar days of continuation of regular pay under 5 U.S.C., Chapter 81, Section 8118.
- N12 Expected to be paid under 5 U.S.C. Chapter 81 following 45 calendar days COP period.
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N20	Severance pay to be resumed by *******.
N21	Severance pay to be recomputed by ********.
N22	Entitled to \$**.** severance pay fund to be paid at the rate of \$**.** per week over **** weeks beginning **_**.
N23	Not entitled to severance pay.
N24	Severance pay suspended by ******* until termination of this appointment.
N25	Severance pay discontinued. Employee has received **** weeks of severance pay.
N26	Lump-sum payment to cover **** hours ending **-**.
N27	Lump-sum payment to be made for any unused annual leave.
N59	OPF retained by ********.
N61	Per Reg 531.203(d)(2)(vi), the rate received solely during period of Interim WGI may not be used to establish highest previous rate.

## Pay Rate (Pxx)

P01	Previously employed at ********.
P02	Pay rate fixed to include rate increase due on same date.
P03	Pay rate is subject to upward retroactive adjustment upon verification of prior service.
P04	Superior qualifications appointment made under Reg 531.203(b).
P05	Special rate under 5 U.S.C. 5305.
P06	Pay rate includes within-grade increases or other rate changes to which employee would have been entitled had he or she remained continuously in Federal service.
P08	Annual salary to be reduced by the amount of your retirement annuity and by future cost of living increases.
P09	Pay or step adjusted **-** by *******.
P10	Annuity at present is \$**.** pa.
P12	Eligibility date for within-grade increase adjusted to reflect excess time in nonpay status. New estimated eligibility date is **-**-**.
P13	Effective date adjusted due to excess time in nonpay status of **** hours.
P14	Work performance is at an acceptable level of competence.

P15	Within-grade increase to step **** denied because your work is not at an acceptable level of competence. You remain at GS ****, step ****.	
P16	Met all requirements for WGI to ********, due on **-**-**.	
P17	Entitled to retained pay until **-**; otherwise, pay would be *******.	
P18	Retained rate period expires **-**- Effective **-** pay will be \$**.**.	
P19	Salary includes WGI for which employee became eligible on **-**-**.	
P20	Position and pay reflect the following actions effective during employee's absence: ********.	
P30	Eligibility date for WGI has been adjusted to reflect credit for service on intermittent work schedule. Estimated eligibility date is **-**-**.	
P48	Salary may not be reduced below salary earned immediately prior to SES conversion with any future involuntary action while continuously employed.	
P54	Superior qualifications appointment made under 35 CFR 251.42.	
P55	Special rate under 35 CFR 251.42.	
P70	Salary in Block 20 includes retention allowance of \$**.**.	
P72	Salary in Block 20 includes supervisory differential of \$**.**.	
P73	Block 20 shows the percent of your rate of adjusted basic pay which is paid to you for the substantial irregular overtime work you perform which cannot be controlled administratively.	
P78	Salary in Block 12 includes retention allowance of \$**.**.	
P80	Salary in Block 12 includes supervisory differential of \$**.**.	
P81	Salary in Block 20 includes AUO of \$**.**.	
P82	Salary in Block 12 includes AUO of \$**.**.	
P85	Amount in Block 20B includes the special pay adjustment for law enforcement officers of \$**.**.	
P90	You are required to submit to the personnel office a copy of any subsequent notice from OPM of any change in your gross annuity rate.	
P91	Within-grade increase denied because your work is not at an acceptable level of competence. Your salary does not change.	
P92	Salary includes a locality-based payment of ****%.	
P93	Special salary rate exceeds the locality rate of pay, so employee receives no locality payment.	

Special adjusted rate for law enforcement officers exceeds locality rate of pay, so employee receives no locality payment.
IGA continued rate of pay continues until one of the terminating conditions of 5 CFR 531.703(g) is satisfied--i.e., the employee's duty station is no longer in an interim geographic adjustment area; the employee is no longer in a position covered by a nationwide or worldwide special salary rate; the employee is entitled to a higher rate of pay under another authority; or the employee is reduced in grade.
P97 This action terminates your IGA continued rate of pay.
P98 Salary in Block 12 includes availability pay of \$\*\*.\*\*.
P99 Salary in Block 20 includes availability pay of \$\*\*.\*\*.

### Employee Reason for Resignation, Retirement, Failure to Relocate or To Accept Reassignment (Rxx)

- R19 Reason for resignation: \*\*\*\*\*\*\*
- R20 Reason for retirement: to obtain retirement benefits.
- R21 Reason for retirement: \*\*\*\*\*\*\*
- R22 Employee has elected to receive workers' compensation in lieu of a retirement annuity.
- R52 Reason(s) for declination of assignment: \*\*\*\*\*\*\*\*
- R53 Reason(s) for declination of relocation: \*\*\*\*\*\*\*\*
- R55 Refused job offer because \*\*\*\*\*\*\*\*.

#### Agency Explanation of Employee's Separation (Sxx)

- S20 \*\*\*\*\*\*\*\*
- S25 Agency finding: \*\*\*\*\*\*\*\*.
- S28 Agency finding: Resigned after receiving written notice on \*\*-\*\* of decision to separate for \*\*\*\*\*\*\*\*
- S29 Agency finding: Resigned after receiving written notice on \*\*-\*\*- of decision to demote for \*\*\*\*\*\*\*\*
- S30 Agency finding: Resigned after receiving written notice on \*\*-\*\* of decision to suspend for \*\*\*\*\*\*\*\*
- S31 Agency finding: Resigned after receiving written notice on \*\*-\*\*- of proposal to separate for \*\*\*\*\*\*\*\*

S32	Agency finding: *******	Resigned after receiving written notice on **_*** of proposal to demote for
S33	Agency finding: *******	Resigned after receiving written notice on **-**- of proposal to suspend for
S34	Agency finding: *******	Retired after receiving written notice on **-**-** of decision to separate for
S35	Agency finding: *******	Retired after receiving written notice on **-**-** of decision to demote for
S36	Agency finding: *******	Retired after receiving written notice on **-**-** of decision to suspend for
S37	Agency finding: *******	Retired after receiving written notice on **-**-** of proposal to separate for
S38	Agency finding: *******	Retired after receiving written notice on **-**-** of proposal to demote for
S39	Agency finding: *******	Retired after receiving written notice on **-**-** of proposal to suspend for
S40	Agency finding: *******	Terminated after receiving written notice on **-**-** of proposal to suspend for
S41	Agency finding: *******	Terminated after receiving written notice on **-**-** of proposal to demote for
S42	Agency finding: *******	Terminated after receiving written notice on **-**- of proposal to separate for
S43	Agency finding: *******	Terminated after receiving written notice on **-**- of decision to suspend for
S44	Agency finding: *******	Terminated after receiving written notice **-**- of decision to demote for
S45	Agency finding: *******	Terminated after receiving written notice on **-**- of decision to separate for
S46	Separated by ord	er of OPM dated **-** for violation of CS *******.
S47	Reason(s) for rer	noval: *******
S48	Reason(s) for ter	mination: ********
S49	Reason for suspe	ension: ********.
S51	RIF notice dated	· **_** <sub>-</sub>

S54	Offered job(s) of *********.
S56	No reason given by employee for refusing job offer.
S57	Refused extension of appointment.
S58	No other work available.
S65	Resigned during initial appointment probationary period.
S66	Resigned during trial period.
S68	Employee gave no reason for resignation.
S69	Employee gave no reason for retiring.
S73	Separation by order of Merit Systems Protection Board dated **-**- for ********.
S74	Agency finding: Resigned after receiving notice of proposed position change as result of failure to satisfactorily complete probationary period for supervisory (or managerial) position.
S75	Agency finding: Resigned after receiving notice of decision on position change as result of failure to satisfactorily complete probationary period for supervisory (or managerial) position.
S77	Suspension to be imposed on ********.
S78	Employee is accompanying a U.S. Government sponsor overseas.
S80	Resigned after receiving notice that within-grade increase would be denied.
S81	Agency finding: Retired after receiving written notice on **-**- of decision to remove from the SES for ********.
S82	Agency finding: Resigned after receiving written notice on **-**-* of proposed placement out of the SES for *********.
S83	There is no annuity reduction based on age per 5 U.S.C. 8339(h).
S84	Eligible for an annuity supplement per 5 U.S.C. 8421(a)(2).

## Tenure (Txx)

T05	Date for conversion to career tenure has been adjusted to reflect credit for service on intermittent work schedule. Estimated conversion date is **-**-**.
T06	Date for conversion to career tenure has been adjusted to reflect excess time in nonpay status. New conversion date is **-**-**.
T07	Completed service requirement for career tenure from **-**-** to **-**-**.

- T08 Service counting towards permanent tenure from \*\*\_\*\*\* to \*\*\_\*\*.
- T09 Service counting towards permanent tenure from \*\*-\*\*-\*\*.
- T10 Service counting toward career tenure from \*\*-\*\*-\*\*.
- T11 Completed one year of current continuous service.
- T29 \*\*\*\*\*\*\*\*.
- T30 Reason for retroactive action:
- T55 Tenure as used for 5 U.S.C. 3502 is not applicable to the Senior Executive Service.

### Retained Grade and Retained Pay (Xxx)

- X35 The retained pay plan and grade \*\*\*\*\*\*\*\* is equivalent to \*\*\*\*\*\*\*\*, the position from which reduced.
- X36 Grade retention entitlement terminated. No further entitlement to grade or pay retention.
- X37 Employee is entitled to retain grade \*\*\*\*\*\*\* through \*\*-\*\*.
- X38 On \*\*-\*\*- employee will be entitled to retain grade of \*\*\*\*\*\* through \*\*-\*\*- provided the preceding period of grade retention is not terminated earlier.
- X39 Employee elected to terminate grade retention entitlement.
- X40 Employee is entitled to pay retention.
- X41 Salary is 150 percent of maximum rate of grade to which assigned.
- X42 Pay retention entitlement terminated.
- X43 Expiration of grade retention period as \*\*\*\*\*\*\*\*.
- X44 Rate is step \*\*\*\* of \*\*\*\*\*\*\*\*, retained grade.
- X45 Retained grade will be used to determine employee's pay, retirement and insurance benefits, and promotion and training eligibility.
- X46 Action gives employee within-grade increase/quality increase to step \*\*\*\* of \*\*\*\*\*\*\*\*, retained grade.
- X47 Action denies within-grade increase to step \*\*\*\* of employee's retained grade.
- X48 Declined offer of \*\*\*\*\*\*\*\*.
- X49 Change to lower grade is for personal cause.
- X50 Failed to comply with priority placement program requirements.

X61	Retained grade will not be used for purposes of reduction-in-force.
X62	Action grants within-grade increase in employee's retained grade of ********.
X63	Action denies within-grade increase in employee's retained grade of *******.
X65	Grade retention entitlement is terminated.
For Inter	nal Use in DOE (Yxx)
Y01	Actual paid salary limited to ******** by 5 USC 5308 or other statute.
Y02	Expected to work ****** hours per week.
Y03	Under 5 USC 3111, student volunteer not a federal employee for any purpose other than injury compensation or laws related to tort claims act. Service not creditable for leave accrual or any other employee benefits.
Y04	Under 5 USC 3111, volunteer service provided during period ******** to ********. Total number of hours provided - *******.
Y05	Description of work performed ****************
Y06	Termination based on expiration of assignment.
Y07	IPA assignment with 50% or more of employee salary reimbursed.
Y08	IPA assignment with less than 50% of employee salary reimbursed.
Y09	Termination based on volunteer's request.
Y10	Salary reflects \$******* supplemental increase granted to insure the new rate range minimum.
Y11	The organization information appearing in items 21 and/or 28 is obsolete; correction will be made as soon as the realignment becomes effective.
Y12	This position is coded ********** for labor management purposes.
Y13	Based on the information contained in the OPF, your SCD has been changed from ********.
Y14	Travel agreement in effect pursuant to authority 5 USC 5723.
Y15	Travel agreement in effect pursuant to authority 5 USC 5724. This transportation not for the convenience of the employee.
Y16	Your service to the Department of Energy is appreciated.
Y17	Welcome to the Senior Executive Service at the Department of Energy

Y18	Action corrects employee's retirement plan in item 30 from "*" in accordance with PL 105-261 dated 10/17/98. New retirement deductions became effective on 10/25/98, however, correction to the retirement plan is retroactive to include all previous actions from **/**/** to **/**/**.
Y19	Accelerated promotion in accordance with DOE-OIG Training Agreement.
Y20	Promotion is NTE **********. Employee informed in advance of the reasons for and the conditions of the promotion.
Y21	Exception to Merit Promotion Plan, **************
Y22	Full performance level is *****.
Y23	Date of last equivalent increase *******.
Y24	Action processed to update employee's record to indicate a change in organization name.
Y25	Action processed to update employee's record to indicate a change in sub-agency.
Y26	Action processed to update employee's record to indicate a change in sub-agency and organization name.
Y27	Award granted after employee separated.
Y31	Type of appointment, position, grade and salary remain unchanged.
Y34	Congratulations on your promotion.
Y35	This action suspends the allotment (if any) for labor organization dues.
Y36	This action resumes the allotment (if any) for labor organization dues.
Y43	Belated election to open season under authority of Section 846.204(a) of Title 5 CFR.
Y44	Special Rate under Public Law 99-141.
Y45	Pay adjustment reflects a longevity increase of *******.
Y46	Pay adjustment reflects a longevity increase which establishes employee's salary at the maximum for this grade.
Y47	Pay adjustment reflects a quality step increase award of 3 percent approved by administrator on **********************************
Y48	Changed payroll provider.
Y50	May be non-competitively promoted to the full performance, GS-**** when eligible and at management discretion.
Y55	Critical position pay granted under authority of office of management and budget letter of *********.
Y56	Salary would be ******* in the absence of critical position pay.
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757	Organization achievement of group goals.
758	Employees covered under FERS who withdrew their retirement contributions may never redeposit these funds and the period covered by the refund will not be creditable for purposes of entitlement or computation of your retirement.
759	Employee entitled to remote site duty allowance.
760	Employment is subject to successful completion of a background investigation. A security clearance is required for continued employment.
761	Accelerated promotion in accordance with FPM Letter 300-34.
762	Mobility agreement required.
763	Payment for travel to duty station from school authorized per Cooperative Education Program agreement.
764	Payment for travel to school from duty station authorized per Cooperative Education Program Agreement.
765	Technical career program for professional engineers.
766	Upward Mobility Program.
767	Career Development Agreement.
768	Promoted under BPA accelerated training/development plan for entry level engineers.
769	Cooperative Education Program
770	Federal Junior Fellowship Program
771	Apprenticeship Training Program.
772	Craftsman Training Program
773	Approved by Craft Committee *********.
774	Salary in accordance with paragraph ******* of the CPTC agreement.
775	Grandfathered senior operations/employee covered with the BPA/CPTC collective bargaining agreement approved December 7, 1979.
776	Grandfathered pay rate in accordance with the BPA/CPTC collective bargaining agreement approved March 2, 1989.
777	Pay in accordance with BPA Personnel Letter 536-3 dated June 7, 1982.
778	This action terminates the allotment (if any) for labor organization dues

- Y79 Appointment is subject to completion of 3-year trial period beginning \*\*\*\*\*\*\*\*\*\*\*.
- Y80 Action due to correction in SCD as of \*\*\*\*\*\*\*\* resulting from retroactive substitution of donated leave received under voluntary leave transfer program for LWOP.
- Y81 Should this appointment later be converted to career-conditional under E.O. 12015, co-op work experiences and LWOP up to 22 work days may be creditable toward completing the required one year probationary period for federal employees if it was in the same line of work and in the same agency.
- Y82 Employment agreement signed \*\*\*\*\*\*\*\*.
- Y83 Employee entitled to 15% Duty Officer pay.
- Beginning November 1, 1993, pay plan code "GM" will identify employees covered by the PMRS termination provisions of Public Law 103-89. A GM employee will continue to be paid at his/her current rate of pay and will be eligible for within-grade increases (WGIs). The WGI waiting period begins the day this merit increase is effected.
- Beginning November 1, 1993, pay plan code "GM" will identify employees covered by the PMRS termination provisions of Public Lay 103-89. A GM employee will continue to be paid at his/her current rate of pay and will be eligible for within-grade increases (WGIs). The WGI waiting period begins the day the employee received his/her last equivalent increase.
- I have met the age and service requirement for voluntary early or regular optional retirement and therefore request to retire with a voluntary separation incentive pay effective \*\*\*\*. My decision to retire is entirely voluntary and has not be coerced. I understand that if I retire from my current employment and receive an incentive payment, I will be responsible for repaying the entire incentive payment to the Department of Energy if I am reemployed by the Federal Government or enter into a personnel services contract with the Federal Government in the next 5 years.
- I understand that if I am selected for incentive pay, this statement serves as my commitment to retire, and my agreement to waive any rights to appeal this action to higher administrative authority. I also understand that if I am not selected for an incentive payment I will be notified of this fact and will not be bound by my election to retire.
- This action terminates the employee's coverage under the provisions of the PMRS Termination Act of 1993 and use of the GM pay plan code.
- I request to resign with a voluntary separation incentive pay effective \*\*\*\*\*. My decision to resign is entirely voluntary and has not been coerced. I understand that if I volunteer to resign from my current employment and receive an incentive payment, I will be responsible for repaying the entire amount of the payment to the Department of Energy if I am reemployed by the Federal Government or enter into a personnel services contract with the Federal Government in the next 5 years.
- I understand that if I am selected for incentive pay, this statement serves as my commitment to resign, and my agreement to waive any rights to appeal this action to higher administrative authority. I also understand that if I am not selected for an incentive payment, I will be notified of this fact and will not be bound by my election to resign.
- Y97 Administrative change to accommodate consistent printing of organization structures on SF-50's Department-wide.
- Y98 Retained pay restrictions suspended based on FY99 Dispatcher Pay Plan.
- Y99 AD Step Increase.

- YA1 Reason for furlough: Lack of appropriations for personnel.
- YA5 Cancellation action and restoration of the lost pay in accordance with the Secretary of Energy's memorandum entitled "Restoring pay lost during furlough."
- YJ1 Entitled to \*\*\*\*\*\*\*\* percent COLA in addition to base salary.
- YJ2 COLA subject to annual OPM review.

### For Internal Use in DOE (Zxx)

- Z01 \*\*\*\*\* \*\*\*\*\* Z02 \*\*\*\*\* Z03Corrects the following Non SF-50 data element(s): \*\*\*\*\*\*\*. Z05 Corrects item 12 from \*\*\*\*\*\*\*\*, item 12A from \*\*\*\*\*\*\*, item 12B from \*\*\*\*\*\*\*, item 12C Z67 from \*\*\*\*\*\*\*, item 12D from \*\*\*\*\*\*, item 20 from \*\*\*\*\*\*, item 20A from \*\*\*\*\*\*, item 20B from \*\*\*\*\*\*\*, item 20C from \*\*\*\*\*\*\*, and item 20D from \*\*\*\*\*\*. Corrects item 12 from \*\*\*\*\*\*\*\*, item 12A from \*\*\*\*\*\*\*, item 12B from \*\*\*\*\*\*, item 12C Z68 from \*\*\*\*\*\*\*, item 20 from \*\*\*\*\*\*, item 20A from \*\*\*\*\*\*, item 20B from \*\*\*\*\*\* and item 20C from \*\*\*\*\*\*\*\* Z69 Corrects item 12 from \*\*\*\*\*\*\*\*, item 12A from \*\*\*\*\*\*\*\*, item 12C from \*\*\*\*\*\*\*\*, item 20 from \*\*\*\*\*\*\*, item 20A from \*\*\*\*\*\*\* and item 20C from \*\*\*\*\*\*\*. Corrects item 12 from \*\*\*\*\*\*\*\*, item 12A from \*\*\*\*\*\*\*\*, item 12C from \*\*\*\*\*\*\*\*, Z70 item 12D from \*\*\*\*\*\*\*\*, item 20 from \*\*\*\*\*\*\* item 20A from \*\*\*\*\*\*\*, item 20C from \*\*\*\*\*\* and 20D from \*\*\*\*\*\*\*
- Z71 Corrects Legal Authority Description for Legal Authority Code ZLM as it appeared in Block 5D or 5F on the Pay Adjustment action corrected.
- This action is taken in accordance with pay provisions of the SES pay-for-performance system established under Section 1125 of the Fiscal Year 2004 National Defense Authorization Act (Public Law 108-136, 11/24/03) that eliminates SES locality pay and replaces the six-level SES pay system with a single pay band system.
- Pay adjustment approved retroactively to \*\*\_\*\*. This action corrects Total Salary, Basic Pay, Locality Adj, Adj Basic Pay and Other Pay in Blocks 20, 20A, 20B, 20C, 20D.
- Pay adjustment approved retroactively to (insert date). This action corrects Total Salary, Basic Pay, Adj Basic Pay, and Other Pay in Blocks 12, 12A, 12C, 12D, and/or Blocks 20, 20A, 20C, 20D.
- Pay adjustment approved retroactively to \*\*\_\*\*. This action corrects Total Salary, Basic Pay, Locality Adj, and Adj Basic Pay in Blocks 20, 20A, 20B, 20C.

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Z76	Pay adjustment approved retroactively to **-**. This action corrects Total Salary, Basic Pay, Ad
	Basic Pay, and Other Pay in Blocks 20, 20A, 20C, 20D.

- Pay adjustment approved retroactively to \*\*-\*\*. This action corrects Total Salary, Basic Pay and Adj. Basic Pay in Blocks 20, 20A, 20C.
- Pay adjustment approved retroactively to (insert date). This action corrects Total Salary, Basic Pay, and Adj Basic Pay in Blocks 12, 12A, 12C, and/or Blocks 20, 20A, 20C.
- Pay adjustment approved retroactively to (insert date). This action corrects Total Salary, Basic Pay, Locality Adj, and Adj Basic Pay in Blocks 12, 12A, 12B, 12C, and/or Blocks 20, 20A, 20B, 20C.
- Pay adjustment approved retroactively to (insert date). This action corrects Total Salary, Basic Pay, Locality Adj, Adj Basic Pay, and Other Pay in Blocks 12, 12A, 12B, 12C, 12D, and/or Blocks 20, 20A, 20B, 20C, 20D.
- Z81 Pay adjustment approved retroactively to (insert date).
- Locality adjustment approved retroactively to (insert date). This action corrects Total Salary, Locality Adj, Adj Basic Pay, and Other Pay in Blocks 12, 12B, 12C, 12D, and/or Blocks 20, 20B, 20C, 20D.
- Locality adjustment approved retroactively to (insert date). This action corrects Total Salary, Locality Adj, Adj Basic Pay in Blocks 12, 12B, 12C, and/or Blocks 20, 20B, 20C.
- Pay adjustment approved retroactively to (insert date). This action corrects Total Salary, Basic Pay, and Adj Basic Pay in Blocks 12, 12A, 12C, and/or Blocks 20, 20A, 20C.
- Z85 Salary includes a locality increase only, no general increase percentage.
- Z86 Salary includes a general increase only not entitled to locality pay.
- Employee is entitled to a "continued rate" (est. Jan. 1994 under 5 CFR 531.106 or 531.307), which is being increased by the dollar amount of the percentage in the employee's underlying GS rate.
- Salary includes a retained rate (adjusted by 1/2 of the dollar amount of the increase in the maximum rate of basic pay payable for the grade of the employee's current position) and a locality payment (or other geographic adjustment) for this area.
- Z89 Employee's continued rate is terminated because the employee became entitled to a rate that exceeded the continued rate.
- Z90 Special Rate for Law Enforcement Officers under Section 403 of Public Law 101-59.
- Z91 This action implements an increase in your scheduled rate of pay.
- Salary includes a general increase of \*\*\* percent and a locality payment (or other geographic adjustment) applicable in this area.
- Salary includes a GS rate (increased by \*\*\*\* percent) plus a locality payment (or other geographic adjustment) applicable in this area. Employee's underlying special rate, which is used for certain pay administration purposes, also is increased by \*\*\*\* percent.

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Z94 Salary includes a special rate increase of \*\*\*\* percent. Employee receives no other adjustment because special rate provides highest pay entitlement. Z95 Salary includes a law enforcement special rate increase of \*\*\*\* percent and a locality payment (or other geographic adjustment) applicable in this area. Z96 Salary includes special performance-based increase for EN employees. Z97 Change in Competitive Area. Z98 Change in Competitive Level. Z99 Employee is entitled to Danger Pay at a rate of \*\*%. This percentage is applied to basic pay. ZZA You have 30 days from the effective date of this SF-50 to register for the Department of Energy's reemployment priority list. ZZB Ineligible for consideration under the Department of Energy's Reemployment Priority Selection Program. ZZC Entitled to reemployment priority selection in the Department of Energy. You must apply for specific vacancies within 30 calendar days from the opening date of vacancy announcements. Entitlement under this program expires \*\*\*\*\*\*\*\*. ZZV Eligible to elect coverage under the Federal Employees Retirement System (FERS) within 6 months of

the effective date of this personnel action. SF-3109 provided to employee.

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## 14.6 FEGLI Codes

Code	Description
90	Basic + Option B (3x)
A0	Ineligible
В0	Waived
C0	Basic Only
D0	Basic + Option A
E1	Basic + Option C (1x)
E2	Basic + Option C $(2x)$
E3	Basic + Option C $(3x)$
E4	Basic + Option C $(4x)$
E5	Basic + Option C $(5x)$
F1	Basic + Option A + Option C $(1x)$
F2	Basic + Option A + Option C $(2x)$
F3	Basic + Option A + Option C $(3x)$
F4	Basic + Option A + Option C $(4x)$
F5	Basic + Option A + Option C $(5x)$
G0	Basic + Option B $(1x)$
Н0	Basic + Option B $(1x)$ + Option A
I1	Basic + Option B $(1x)$ + Option C $(1x)$
I2	Basic + Option B $(1x)$ + Option C $(2x)$
I3	Basic + Option B $(1x)$ + Option C $(3x)$
I4	Basic + Option B $(1x)$ + Option C $(4x)$
I5	Basic + Option B $(1x)$ + Option C $(5x)$
J1	Basic + Option B $(1x)$ + Option A + Option C $(1x)$
J2	Basic + Option B $(1x)$ + Option A + Option
	C (2x)
J3	Basic + Option B $(1x)$ + Option A + Option C $(3x)$
J4	Basic + Option B $(1x)$ + Option A + Option
] ] ]	C(4x)
J5	Basic + Option B $(1x)$ + Option A + Option
	C(5x)
K0	Basic + Option B (2x)
L0	Basic + Option B (2x) + Option A
M1	Basic + Option B $(2x)$ + Option C $(1x)$
M2	Basic + Option B $(2x)$ + Option C $(2x)$
M3	Basic + Option B $(2x)$ + Option C $(3x)$
M4	Basic + Option B $(2x)$ + Option C $(4x)$
M5	Basic + Option B $(2x)$ + Option C $(5x)$
N1	Basic + Option B (2x) + Option A + Option C (1x)
N2	Basic + Option B (2x) + Option A + Option
114	C(2x)
N3	Basic + Option B (2x) +Option A + Option

Code	Description
	C (3x)
N4	Basic + Option B (2x) + Option A + Option
27.5	C (4x)
N5	Basic + Option B (2x) + Option A + Option C (5x)
P0	Basic +Option B (3x) + Option A
Q1	Basic +Option B $(3x)$ + Option C $(1x)$
Q2	Basic +Option B (3x) + Option C (2x)
Q3	Basic +Option B (3x) + Option C (3x)
Q4	Basic +Option B (3x) + Option C (4x)
Q5	Basic +Option B (3x) + Option C (5x)
R1	Basic + Option B (3x) + Option A + Option
	C(1x)
R2	Basic + Option B (3x) + Option A + Option
	C (2x)
R3	Basic + Option B $(3x)$ + Option A + Option
7.4	C (3x)
R4	Basic + Option B $(3x)$ + Option A + Option
R5	C (4x) Basic + Option B (3x) + Option A + Option
KS	C $(5x)$
S0	Basic + Option B (4x)
T0	Basic + Option B (4x) + Option A
U1	Basic + Option B $(4x)$ + Option C $(1x)$
U2	Basic + Option B (4x) + Option C (2x)
U3	Basic + Option B $(4x)$ + Option C $(3x)$
U4	Basic + Option B $(4x)$ + Option C $(4x)$
U5	Basic + Option B $(4x)$ + Option C $(5x)$
V1	Basic + Option B (4x) + Option A + Option
	C (1x)
V2	Basic + Option B (4x) + Option A + Option
	C (2x)
V3	Basic + Option B $(4x)$ + Option A + Option
	C (3x)
V4	Basic + Option B (4x)+Option A + Option
V5	C (4x) Basic + Option B (4x) + Option A + Option
V 3	C(5x)
W0	Basic + Option B (5x)
X0	Basic + Option B (5x) + Option A
Y1	Basic + Option B $(5x)$ + Option C $(1x)$
Y2	Basic + Option B $(5x)$ + Option C $(2x)$
Y3	Basic + Option B $(5x)$ + Option C $(2x)$
Y4	Basic + Option B $(5x)$ + Option C $(4x)$
Y5	Basic + Option B $(5x)$ + Option C $(5x)$
13	Duois - Option D (SA) - Option C (SA)

Code	Description
Z1	Basic + Option B $(5x)$ + Option A + Option
	C (1x)
Z2	Basic + Option B $(5x)$ + Option A + Option
	C (2x)
Z3	Basic + Option B (5x) + Option A + Option
	C(3x)
<b>Z</b> 4	Basic + Option B $(5x)$ + Option A + Option
	C (4x)
Z5	Basic + Option B $(5x)$ + Option A + Option
	C(5x)

## 14.7 RNO Codes

Code	Description
A	American Indian/Alaskan Native
В	Asian or Pacific Islander
С	Black, not of Hispanic origin
D	Hispanic
Е	White, not of Hispanic origin
F	Asian Indian
G	Chinese*
Н	Filipino*
J	Guamanian*
K	Hawaiian*
L	Japanese*
M	Korean*
N	Samoan*
P	Vietnamese*
Q	All Other Asian or Pacific
	Islanders*
Y	Not Hispanic In Puerto Rico**

<sup>\*</sup>Use these code only for employees with a Duty Station in Hawaii

<sup>\*\*</sup>Use this code only for employees with a Duty Station in Hawaii

## 14.8 Education Level Codes/Definitions

Code	Definition
01	No formal education or some elementary school
	did not complete. Elementary school means grades
	1 through 8, or equivalent, not completed.
02	Elementary school completedno high school. Grade 8 or equivalent
02	completed.
03	Some high schooldid not graduate. High school means grades 9 through 12 or equivalent.
04	High school graduate or certificate of equivalency.
05	Terminal occupational programdid not complete. Program extending beyond grade 12, usually no more than three years; designed to prepare students for immediate employment in an occupation or cluster of occupations; not designed as the equivalent of the first two or three years of a baccalaureate degree program. Includes cooperative training or apprenticeship consisting of formal classroom instruction coupled with onthe-job training.
06	Terminal occupational programcertificate of completion, diploma or equivalent. See code 05 above for definition of terminal occupational program. Two levels are recognized: (1) The technical and/or semi-professional level preparing technicians or semiprofessional personnel in engineering and non-engineering fields; and (2) the craftsman/clerical level training artisans, skilled operators, and clerical workers.
07	Some collegeless than one year. Less than 30 semester hours or 45 quarter hours completed.
08	One year college. 30-59 semester hours or 45-89 quarter hours completed.
09	Two years college. 60-89 semester hours or 90-134 quarter hours completed.
10	Associate degree. 2-year college degree program completed.
11	Three years college. 90-119 semester hours or 135-179 quarter hours completed.
12	Four years college. 120 or more semester hours or 180 or more quarter hours completedno baccalaureate (Bachelor's) degree.
13	Bachelor's degree. Requires completion of at least four, but no more than five, years of academic work; includes Bachelor's degree conferred in a cooperative plan or program that provides for alternate class attendance and employment in business, industry, or government to allow student to combine actual work experience with college studies.
14	Post-Bachelor's. Some work beyond (at a higher level than) the Bachelor's degree but no additional higher degree.
15	First professional. Signifies the completion of academic requirements for selected professions that are based on programs requiring at least two academic years of previous college work for entrance and a total of a least six academic years of college work for completion, e.g., Dentistry (D.D.S. or D.M.D.), Law (LL. B. or J.D.), Medicine (M.D.), Theology (B.D.),

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Code	Definition
	Veterinary Medicine (D.V.M.), Chiropody or Podiatry (D.S.C. or D.P.), Optometry (O.D.), and Osteopathy (D.O.).
16	Post-first professional. Some work beyond (at a higher level than) the first professional degree but no additional higher degree.
17	Master's degree. For liberal arts and sciences customarily granted upon successful completion of one (sometimes two) academic years beyond the Bachelor's degree. In professional fields, an advanced degree beyond the first professional but below the Ph.D., e.g., the LL.M.; M.S. in Surgery following the M.D.; M.S.D., Master of Science in Dentistry; M.S.W., Master of Social Work.
18	Post-Master's. Some work beyond (at a higher level than) the Master's degree but no additional higher degree.
19	Sixth-year degree. Includes such degrees as Advanced Certificate in Education, Advanced Master of Education, Advanced Graduate Certificate, Advanced Specialist in Education Certificate, Certificate of Advanced Graduate Study, Certificate of Advanced Study, Advanced Degree in Education, Specialist in Education, Licentiate in Philosophy, Specialist in Guidance and Counseling, Specialist in Art, Specialist in Science, Specialist in School Administration, Specialist in School Psychology, Licentiate in Sacred Theology.
20	Post-sixth year. Some work beyond (at a higher level than) the sixth-year degree but no additional higher degree.
21	Doctorate degree. Includes such degrees as Doctor of Education, Doctor of Juridical Science, Doctor of Public Health, and the Ph. D. (or equivalent) in any field. Does not include the Doctor's degree that is a first professional degree, per code 15.
22	Post-Doctorate. Work beyond the Doctorate.

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## 14.9 Annuitant Indicator Codes

Code	Description
1	Reemployed Annuitant-CSRS
2	Retired Officer
3	Retired Enlisted
4	Retired Officer/Reemployed Annuitant- CSRS
5	Retired Enlisted/Reemployed Annuitant- CSRS
6	CSRS-No Reduction
7	Retired Officer/CSRS-No Reduction
8	Retired Enlisted/CSRS-No Reduction
9	Not Applicable
Α	Reemployed Annuitant-FERS
В	Former Annuitant-FERS
С	Retired Officer/Reemplpyed Annuitant- FERS
D	Retired Officer/Former Annuitant-FERS
Е	Retired Enlisted/Reemployed Annuitant- FERS
F	Retired Enlisted/Former Annuitant-FERS
G	FERS- No Reduction
Н	Retired Officer/FERS-No Reduction
J	Ret Enlisted/FERS-No Reduction

# **14.10 FERS Coverage Codes**

Code	Description
A	Automatically Covered By FERS
Е	Elected Coverage Under FERS
N	Not Covered By FERS

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## 14.11 Functional Class Codes

Code	Description
00	Not Applicable
11	Research
12	Research, Contract/Grant Administration
13	Development
14	Test and Evaluation
21	Design
22	Construction
23	Production
24	Installation/Operation/Maintenance
31	Data Collect/Process/Analysis
32	Scientific/Technical Info
41	Standards and Specifications
42	Regulatory Enforcement/Licensing
51	Natural Resource Operations
81	Clinical Practice/Counseling & Ancillary
	Medical Services
91	Planning
92	Management
93	Teaching/Training
94	Technical Assistance/Consulting
99	Other

## Functional Class Code will be used for the following Series only:

GS-000, Miscellaneous Occupations Group		
020	Community Planning	

GS-100, Social Science, Psychology, and Welfare				
Group				
101	Social Science			
110	Economist			
140	Manpower Research and Analysis			
150	Geography			
170	History			
180	Psychology			
184	Sociology			
185	Social Worker			
190	General Anthropology			
198	Archeology			

GS-400, Biological Sciences Group			
401	General Biological Sciences		
403	Microbiology		
405	Pharmacology		
406	Agricultural Extension		
408	Ecology		

	•		
410	Zoology		
413	Physiology		
GS-400, Biological Sciences Group (cont.)			
414	Entomology		
430	Botany		
434	Plant Pathology		
435	Plant Physiology		
436	Plant Protection and Quarantine		
437	Horticulture		
440	Genetics		
454	Range Conservation		
457	Soil Conservation		
460	Forestry		
470	Soil Science		
471	Agronomy		
475	Agricultural Management		
480	General Fish and Wildlife		
	Administration		
482	Fishery Biology		
485	Wildlife Refuge Management		
486	Wildlife Biology		
487	Animal Science		
493	Home Economics		
493	Home Economics		

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GS-600, Medical, Hospital, Dental, and Public				
Health Group				
601	General Health Science			
602	Medical Officer			
610	Nurse			
630	Dietician and Nutritionist			
631	Occupational Therapist			
633	Physical Therapist			
635	Corrective Therapist			
637	Manual Arts Therapist			
638	Recreation/Creative Arts Therapist			
639	Educational Therapist			
644	Medical Technologist			
660	Pharmacist			
662	Optometrist			
665	Speech Pathology and Audiology			
668	Podiatrist			
680	Dental Officer			
690	Industrial Hygiene			
696	Consumer Safety			

GS-700, Veterina	ry Medical Science Group
701	Veterinary Medical Science

GS-800, Engineering and Architecture Group				
801	General Engineering			
803	Safety Engineering			
804	Fire Prevention Engineering			
806	Materials Engineering			
807	Landscape Architecture			
808	Architecture			
810	Civil Engineering			
819	Environmental Engineering			
830	Mechanical Engineering			
840	Nuclear Engineering			
850	Electrical Engineering			
854	Computer Engineering			
855	Electronics Engineering			
858	Biomedical Engineering			
861	Aerospace Engineering			
871	Naval Architecture			
880	Mining Engineering			
881	Petroleum Engineering			
890	Agricultural Engineering			

892	Ceramic Engineering
893	Chemical Engineering
894	Welding Engineering
896	Industrial Engineering

GS-1200, Copyright, Patent, and Trade Mark Group			
1220	Patent Administration		
1221	Patent Adviser		
1223	Patent Classifying		
1224	Patent Examining		
1225	Patent Interference Examining		
1226	Design Patent Examining		

GS-1300, Physical Sciences Group			
1301	General Physical Science		
1306	Health Physics		
1310	Physics		
1313	Geophysics		
1315	Hydrology		
1320	Chemistry		
1321	Metallurgy		
1330	Astronomy and Space Science		
1340	Meteorology		
1350	Geology		
1360	Oceanography		
1370	Cartography		
1372	Geodesy		
1373	Land Surveying		
1380	Forest Products Technology		
1382	Food Technology		
1384	Textile Technology		
1386	Photographic Technology		

GS-1500, Mathematics and Statistics Group			
1510	Actuary		
1515	Operations Research		
1520	Mathematics		
1529	Mathematical Statistician		
1530	Statistician		
1540	Cryptography		
1550	Computer Science		

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# 14.12 Handicap Codes

Code	Description
	Blind in both eyes
24	Blind in one eye
83	Blood diseases
88	Cancer with complete recovery
	Cancer – Undergoing treatment
	Chronic prob combinations
	Chronic problem back
48	Chronic problem hip/pelvis
46	Chronic problem one/both arms
45	Chronic problem one/both feet
44	Chronic problem one/both hands
47	Chronic problem one/both legs
78	Complete paralysis 3 maj mmbrs
73	Complete paralysis both arms
	Complete paralysis both hands
75	Complete paralysis both legs
76	Complete paralysis lower body
72	Complete paralysis one arm
70	Complete paralysis one hand
	Complete paralysis one leg
	Complete paralysis one side
82	Convulsive disorder
16	Deafness ears/clear speech
	Deafness ears/unclear speech
84	Diabetes
93	Disfigurement face/hands/feet
	Handicap not identified
	Handicap Not Listed
	Hard of Hearing
81	Heart disease with restriction
	Heart disease/no restrictions
87	Kidney dysfunction

*To be used o	only for acco	ccione n	rior to	10 01 1097

Code	Description
94	Learning disability
22	Loss of peripheral vision
91	Mental or emotional illness
	Mental retardation
34	Missing both feet or legs
33	Missing both hands or arms
36	Missing hand/arm and feet/legs
35	Missing hand/arm and foot/leg
38	Missing hands/arms & feet/legs
37	Missing hands/arms & foot/leg
28	Missing one arm
29	Missing one foot
27	Missing one hand
	Missing one leg
04	No handicap*
05	No handicap
68	Partial paralysis 3 major parts
66	Partial paralysis both arms
64	Partial paralysis both hands
65	Partial paralysis both legs
62	Partial paralysis one arm
	Partial paralysis one hand
	Partial paralysis one leg
67	Partial paralysis one side
86	Pulmonary/respiratory disorder
92	Severe distortion limbs/spine
13	Severe speech malfunctions
23	Unable to read ordinary print

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## **14.13 LEO Position Codes**

Code	Description
5	5USC 5305 LEO
C	D. C. Police Forces
F	Fire Fighter
N	Not Applicable
P	Primary FEPCA
S	Secondary FEPCA
T	NucMatCour, PL 105-261 (Prim)
U	NucMatCour, PL 105-261 (Sec)

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## **14.14 Military Reserve Codes**

Code	Description
A	IMA-Air Force*
В	IMA-Army*
С	IMA-Coast Guard*
D	IMA-Marines*
Е	IMA-Navy*
F	Selected Reserve - Air Force
G	Selected Reserve – Army
Н	Selected Reserve - Coast Guard
I	Selected Reserve – Marine Corps
J	Selected Reserves – Navy
K	Air National Guard
L	Army National Guard
M	IRR - Air Force**
N	IRR - Army**
О	IRR - Coast Guard**
P	IRR - Marine Corps**
Q S	IRR - Navy**
S	Standby Reserve - Air Force
T	Standby Reserve – Army
U	Standby Reserve - Coast Guard
V	Standby Reserve – Marine Corps
W	Standby Reserve – Navy
X	Navy Reserve - Merchant Marines
Y	Draft Eligible
Z	Not Applicable

<sup>\*</sup> IMA - Individual Mobilization Augmentees. \*\* IRR - Individual Ready Reserve.

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# 14.15 Pay Basis Codes

Code	Description
BW	Bi-Weekly
FB	Fee Basis
PA	Per Annum
PD	Per Diem
PH	Per Hour
PM	Per Month
PW	Piece Work
SY	School Year
WC	Without Compensation

# **14.16 Pay Rate Determinant Codes**

Code	Description
0	Regular Rate
2	Saved Rate – Indefinite
3	Retained Pay - Spec Rt Adjust
4	Saved Rate – Other
5	Special & Superior Quals
6	Special Rate
7	Superior Qualifications Rate
Α	Retained Grade - Diff Posn
В	Retained Grade - Same Posn
С	Critical Position Pay
Е	Rtnd Grd & Spec Rt - Diff Posn
F	Rtnd Grd & Spec Rt - Same Posn
J	Retained Pay - Same Position
K	Retained Pay - Diff Position
M	Continued IGA Pay
P	Preserved IGA Pay
R	Retained Pay - SES Removal
S	Continued SES Basic Pay
T	Below the Minimum Rate
U	Rtnd Grade & Pay - Same Posn
V	Rtnd Grade & Pay - Diff Posn

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# **14.17 Position Occupied Codes**

Code	Description
1	Competitive
2	Excepted
3	SES General
4	SES Career Reserved

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## 14.18 Retirement Plan Codes

Code	Description
1	CSRS
2	FICA
4	None
6	CSRS – Special
С	FICA and CSRS (Partial)
Е	FICA and CSRS Special (Partial)
K	FERS and FICA
M	FERS and FICA Special
R	FICA and CSRS (Full)
T	FICA and CSRS - Spec (Full)

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# **14.19 Security Clearance Codes**

Code	Description
0	Not Required
1	Confidential
2	Secret
3	Top Secret
4	Sensitive Compartmented Info
5	Q Sensitive
6	Q Non-Sensitive
7	L (Atomic Energy Act)
8	Other

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# **14.20** Sensitivity Codes

Code	Description
1	NonSensitive
2	Non-Critical-Sensitive
3	Critical-Sensitive
4	Special-Sensitive
5	Moderate Risk
6	High Risk

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# **14.21 Special Employment Program Codes**

Code	Description
00	Not Applicable
10	Welfare to Work
11	Special Exemption to Ceiling
20	Intern Program
21	Completed Intern Program
22	Intern Program - Did Not Finish
30	Tech Ldrshp Dev Prg
31	Tech Ldrshp Dev Prg – Cmp1
32	Tech Ldrshp Dev Prg – Incmp
50	Seasonal New Hire
54	STEP Sch B 213.3202
56	Summer Program Reg. 316.402A
58	VRA/Worker-Trainee
59	Veteran's Readjustment Program
60	DOE Intern Program
61	Vietnam Era Vet
62	SCEP Sch B 213.3202
66	Reemployed Annuitant
67	Special Handicap Appt.
69	Presidential Mgmt Intern
80	SES Candidate Development
83	Upward Mobility Participant
91	Student Volunteer
96	Appt DOE IPA
97	Detail LWOP under IPA
98	NNSA Dual Hat

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# **14.22** Manager Level Codes

Code	Description
2	Supervisor or Manager
4	Supervisor (CSRA)
5	Management Official (CSRA)
6	Leader
7	Team Leader - 2GR
8	All Other Positions

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## 14.23 Tenure Codes

Code	Description	
0	None	
1	Permanent	
2	Conditional	
3	Indefinite	

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# **14.24** Type of Appointment Codes

Code	Description		
10	Career (Competitive Svc Perm)		
15	Career-Conditional (Comp Perm)		
20	Nonpermanent (Comp NonPerm)		
30	Schedule A (Except Svc Perm)		
32	Schedule B (Except Svc Perm)		
36	Executive (Except Svc Perm)		
38	Other (Except Svc Perm)		
40	Schedule A (Except Non Perm)		
42	Schedule B (Except Non Perm)		
44	Schedule C (Except Non Perm)		
46	Executive (Except NonPerm)		
48	Other (Except NonPerm)		
50	Career (Senior Exec Perm)		
55	Noncareer (Senior Exec Perm)		
60	Limited Term (Senior Exec NonPerm)		
65	Limited Emergency (SES Nonperm)		

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## **14.25** Veterans Preference Codes

Code	Description	
1	Vone	
2	5 Point	
3	10 Point Disability	
4	10 Point Comp < 30%	
5	10 Point Other	
6	10 Point 30%+ Comp	

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## 14.26 Veterans Status Codes

Code	Description		
В	Pre-Vietnam-Era Veteran		
N*	Not a Vietnam-Era Veteran		
P	Post-Vietnam-Era Veteran		
V	Vietnam-Era Veteran		
X	Not a Veteran		

<sup>\*</sup>Used only for an employee whose accession to the agency's rolls was prior to 10-01-1991.

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## 14.27 Work Schedule Codes

Code	Description			
В	Baylor Plan			
F	Full-Time			
G	Full-Time Seasonal			
I	Intermittent			
J	Intermittent-Seasonal			
P	Part-Time			
Q	Part-Time Seasonal			
S	Part-Time Job Sharer			
T	Part-Time Seasonal Job Sharer			

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## 14.28 Rating Patterns

	Number of Summary Levels in Program	Ratings						
		1	2	3	4	5	X	Z
DOE-Department of Energy*	All (A, B, C, D, E, F)	X	X	X	X	X	X	X
OFA-Other Federal Agency*	All(A, B, C, D, E, F)	X	X	X	X	X	X	X
A	Two	X		X			X	X
В	Three	X		X		X	X	X
C	Three	X		X	X		X	X
D	Three	X	X	X			X	X
E	Four	X		X	X	X	X	X
F	Four	X	X	X		X	X	X
G	Four	X	X	X	X		X	X
Н	Five	X	X	X	X	X	X	X

#### Ratings:

- 1=Unsatisfactory/Unacceptable
- 2=Marginal or Equivalent
- 3=Fully Successful or Equivalent
- 4=Highly Successful or Equivalent
- 5=Outstanding or Equivalent
- X=Not Rated
- Z=Excluded From Coverage

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<sup>\* &</sup>quot;DOE" and "OFA" patterns/scales encompass all official OPM rating patterns and will be used only for historical ratings issued prior to 10/01/97.

# 14.29 Earnings Codes

Administratively Uncontrollable Overtime %	Earnings Code		
10%	A10		
15%	A15		
25%	A25		
A 11-1-11/e D	F		
Availability Pay	Earnings Code		
Availability Pay	AVL		
Standby Premium	Earnings Code		
Standby Premium	B15		
Switter J. Letter 1.	12.0		
Cost-of-Living A&D-NonForeign	Earnings Code		
22%	C22		
25%	C25		
Foreign Post Differential	Earnings Code		
5%	F05		
10%	F10		
15%	F15		
20%	F20		
25%	F25		
D D	F : C1		
Danger Pay	Earnings Code		
15%	G15		
25%	G25		
Home Leave Authorized	Earnings Code		
5	H05		
10	H10		
15	H15		
Post Allowance	Earnings Code		
1 Family Member	P01		
2 Family Members	P02		
3 Family Members	P03		
4 Family Members	P04		
5 Family Members	P05		
6 Family Members	P06		
7 Family Members	P07		
8 Family Members	P08		
9 Family Members	P09		
10 Family Members	P10		
11 Family Members	P11		
12 Family Members	P12		
13 Family Members	P13		
14 Family Members	P14		
15 Family Members	P15		
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Physician's Comparability Allowance	Earnings Code		
Various Rates	PC0		

Retention Allowance %	Earnings Code
1%	R01
1.5%	R0A
2%	R02
2.5%	R0B
3%	R03
3.5%	R0C
4%	R04
4.5%	R0D
5%	R05
5.5%	R0E
6%	R06
6.5%	R0F
7%	R07
7.5%	R0G
8%	R08
8.5%	R0H
9%	R09
9.5%	R0I
10%	R10
10.5%	R1J
11%	R11
11.5%	R1K
12%	R12
12.5%	R1L
13%	R13
13.5%	R1M
14%	R14
14.5%	R1N
15%	R15
15.5%	R1O
16%	R16
16.5%	R1P
17%	R17
17.5%	R1Q
18%	R18

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Retention Allowance %	Earnings Code
18.5%	R1R
19%	R19
19.5%	R1S
20%	R20
20.5%	R2T
21%	R21
21.5%	R2U
22%	R22
22.5%	R2V
23%	R23
23.5%	R2W
24%	R24
24.5%	R2X
25%	R25
Pay Period Amount *	R00

 $<sup>^{*}</sup>$  NOTE: If using a percentage will result in the employee exceeding the salary cap, continue to use the pay period dollar amount until further notice.

Supervisory Differential	Earnings Code		
Various rates	S00		

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# **14.30 Competitive Areas**

	COMPETITIVE	COMPETITIVE	
SUB-AGENCY	AREA CODE	AREA DESCRIPTION	
AB	HR	ME&AB/Washington, DC and Germantown, MD	
AL	AA	AL/Amarillo and Pantex, TX	
AL	AB	AL/Germantown, MD	
AL	AC	AL/Eddy County, NM	
AL	AK	AL/Kansas City, MO	
AL	AL	AL/Albuquerque, NM	
AL	AN	AL/Los Alamos, NM	
AL	AO	AL/Oak Ridge, TN	
AL	AP	AL/Livermore, CA	
AL	AQ	AL/Ft Smith, AR	
AR	MA	AR/Albany, OR	
СВ	EM	CB/EM - Carlsbad, NM	
СН	1C	CH/Argonne and Batavia, IL	
СН	2C	CH/Idaho Falls, ID	
СН	3C	CH/Plainsboro, NJ	
СН	4C	CH/Upton, NY	
СН	5C	CH/Germantown, MD	
СН	6C	CH/New York, NY	
СН	7C	Oakland, CA	
CI	СО	CI/Washington, DC	
CN	CN	CN/Washington, DC	
CR	CR	CR/Washington, DC and Germantown, MD	
EA	EA	EA/Washington, DC and Germantown, MD	
ED	EC	ED/Washington, DC	
EE	EE	EE/Washington, DC	
EH	ЕН	EH/Washington, DC and Germantown, MD	
EH	HA	EH/Golden, CO	
EH	НВ	EH/Idaho Falls, ID	
EH	НС	EH/Oakland, CA	
EH	HD	EH/Los Alamos, NM	
EH	HE	EH/Aiken, SC	
EH	HF	EH/Oak Ridge, TN	
EH	НН	EH/Honolulu, HI	
EH	HJ	EH/Amarillo, TX	
EH	НО	EH/Cincinnati, OH	
EH	HW	EH/Richland, WA	
EI	EI	EI/Washington, DC	

	COMPETITIVE	COMPETITIVE
SUB-AGENCY	AREA CODE	AREA DESCRIPTION
EI	ET	EI/Dallas, TX
EM	EM	EM/Washington, DC and Germantown, MD
EM	MO	EM/Oak Ridge, TN
FE	F1	FENPR/Casper, WY
FE	F2	FENPR/Tupman, CA
FE	FE	FE/Washington, DC and Germantown, MD
FI	FM	FI/Washington, DC and Germantown, MD
GC	GL	GC/Washington, DC
GO	GA	GO/Atlanta, GA
GO	GG	GO/Golden, CO
GO	GI	GO/Chicago, IL
GO	GP	GO/Philadelphia, PA
GO	GS	GO/Seattle, WA
GO	GT	GO/Boston, MA
HG	HG	HG/Washington, DC and Arlington, VA
IA	IS	IA/Washington, DC
ID	1I	ID/Idaho Falls and Scoville, ID
ID	6I	ID/Grand Junction, CO
IG	IA	IG/Washington, DC and Germantown, MD
IG	IC	IG/Oak Ridge, TN
IG	ID	IG/Argonne, IL
IG	IE	IG/Pittsburgh, PA
IG	IF	IG/Plainsboro, NJ
IG	IH	IG/Aiken, SC
IG	II	IG/Albuquerque, NM
IG	IJ	IG/Golden, CO
IG	IK	IG/Idaho Falls, ID
IG	IM	IG/Las Vegas, NV
IG	IO	IG/Livermore, CA
IG	IQ	IG/Fernald, OH
IG	IR	IG/Los Alamos, NM
IG	IT	IG/Richland, WA
IM	IB	IM/Washington, DC and Germantown, MD
IN	IN	IN/Washington, DC
LM	LG	LM/Grand Junction, CO
LM	LM	LM/Washington, DC & Germantown, MD
LM	LP	LM/Pittsburgh, PA
LM	LR	LM/Rocky Flats, CO
LM	LW	LM/Morgantown, WV
ME	HR	ME&AB/Washington, DC and Germantown, MD

arm Lamiari	COMPETITIVE	COMPETITIVE
SUB-AGENCY	AREA CODE	AREA DESCRIPTION
NE	N3	NE/Groton, CT
NE	N5	NE/Charleston, SC
NE	NE	NE/Washington, DC, Germantown, MD and Arlington, VA
NT	MB	NT/Butte, MT
NT	MC	NT/Tulsa, OK
NT	MF	NT/Fairbanks, AK
NT	MG	NT/Morgantown, WV
NT	MP	NT/Bruceton, PA
NV	NA	NV/Andrews AFB, MD
NV	NT	NV/Austin, TX
NV	NV	NV/Las Vegas, Mercury and Nevada Test Site-Area 6, NV
OA	O1	OA/Golden, CO
OA	OI	OA/Washington, DC and Germantown, MD
ОН	OA	OH/Miamisburg, Fernald and Springdale, OH
ОН	OB	OH/West Valley, NY
ОН	OC	OH/Columbus, OH
ОН	OD	OH/Ashtabula, OH
ОН	OF	OH/Upton, NY
00	BA	OO/Berkeley, Livermore, Menlo Park and Oakland, CA
00	BB	OO/Los Angeles, CA
00	BC	OO/San Diego, CA
OO	BD	OO/Cambridge, MA
OO	BE	OO/West Bend, WI
OR	OK	OR/Paducah, KY
OR	ON	OR/Newport News, VA
OR	00	OR/Stanford, CA
OR	OP	OR/Piketon, OH
OR	OR	OR/Oak Ridge, TN
OR	OS	OR/St Charles, MO
OR	OT	OR/Pittsburgh, PA
OS	S1	OS/Washington, DC
PA	PA	PA/Washington, DC
PC	PC	PC/Washington, DC
PI	PB	PI/Washington, DC/Germantown, MD
PO	PO	PO/Washington, DC
PP	PP	PP/Lexington, Paducah and Piketon, KY
PS	PS	PS/Richland, WA
RD	RD	RD/Las Vegas, NV
RD	RE	RD/Washington, DC
RF	RF	RF/Jefferson (County), CO

CLID A CENTON	COMPETITIVE	COMPETITIVE
SUB-AGENCY	AREA CODE	AREA DESCRIPTION
RL	RL	RL/Richland and Hanford, WA
RS	1G	RS/Seattle, WA
RS	2G	RS/Oakland, CA
RS	3G	RS/Kansas City, MO
RS	5G	RS/Honolulu, HI
RS	G1	RS/Atlanta, GA
RS	G2	RS/Boston, MA
RS	G3	RS/Chicago, IL
RS	G4	RS/Golden, CO
RS	G5	RS/Dallas, TX
RS	G6	RS/Philadelphia, PA
RS	G8	RS/New York, NY
RW	RW	RW/Washington, DC
RW	YM	YM&RW/Las Vegas and Jackass Flats, NV
SA	SA	SA/Washington, D.C., Germantown, MD, Albuquerque, NM
SC	EN	SC/Washington, DC and Germantown, MD
SE	SP	SE/Elberton, GA
SO	SO	SO/Washington, DC and Germantown, MD
SP	1P	SPRO/New Orleans, LA
SP	2P	SPRO/Baton Rouge, LA
SP	3P	SPRO/Hackberry, LA
SP	5P	SPRO/Freeport, TX
SP	6P	SPRO/Winnie, TX
SR	SR	SR/Aiken, SC
ST	EO	ST/Oak Ridge, TN
SW	SG	SW/Gore, OK
SW	SJ	SW/Jonesboro, AR
SW	SS	SW/Springfield, MO
SW	ST	SW/Tulsa, OK
SW	SU	SW/Tupelo, OK
SW	SW	SW/Washington, DC
TD	TD	TD - Washington, DC
WA	CY	WAPA/Cheyenne, WY
WA	WA	WAPA/Washington, DC
WA	WM	WAPA/Lakewood and Golden, CO
WB	1W	WAPA/Armour, SD
WB	2W	WAPA/Fort Thompson, SD
WB	3W	WAPA/Huron, SD
WB	4W	WAPA/Philip, SD
WB	5W	WAPA/Pierre, SD

	COMPETITIVE	COMPETITIVE
SUB-AGENCY	AREA CODE	AREA DESCRIPTION
WB	6W	WAPA/Rapid City, SD
WB	7W	WAPA/Sioux Falls, SD
WB	8W	WAPA/Watertown, SD
WB	BT	WAPA/Brayton, IA
WB	W5	WAPA/Bismarck, ND
WB	W6	WAPA/Devils Lake, ND
WB	W7	WAPA/Fargo and West Fargo, ND
WB	W8	WAPA/Jamestown, ND
WB	W9	WAPA/Williston, ND
WB	WR	WAPA/Hinton, IA
WB	WS	WAPA/Granite Falls, MN
WB	WT	WAPA/Billings, MT
WB	WU	WAPA/Conrad, MT
WB	WV	WAPA/Fort Peck, MT
WB	WW	WAPA/Glendive, MT
WB	WX	WAPA/Havre, MT
WB	WY	WAPA/Miles City, MT
WG	W3	WAPA/Boulder City, NV
WG	WB	WAPA/Coolidge, AZ
WG	WC	WAPA/Flagstaff, AZ
WG	WD	WAPA/Page, AZ
WG	WE	WAPA/Phoenix, AZ
WG	WF	WAPA/Yuma, AZ
WG	WK	WAPA/Parker, AZ
WJ	BR	WAPA/Brush, CO
WJ	CC	WAPA/Craig, CO
WJ	CD	WAPA/Cody, WY
WJ	CE	WAPA/Cheyenne, WY
WJ	СР	WAPA/Casper, WY
WJ	GE	WAPA/Gering, NE
WJ	НҮ	WAPA/Hayden, CO
WJ	KR	WAPA/Kremmling, CO
WJ	LO	WAPA/Loveland, CO
WJ	MS	WAPA/Montrose, CO
WJ	SY	WAPA/Sidney, NE
WJ	TH	WAPA/Thermopolis, WY
WJ	W1	WAPA/Lincoln, NE
WJ	W4	WAPA/Shiprock, NM
WJ	WP	WAPA/Poncha Springs, CO
WL	9W	WAPA/Salt Lake City, UT

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SUB-AGENCY	AREA CODE	AREA DESCRIPTION
WL WL	MS VE	WAPA/Montrose, CO WAPA/Vernal, UT
WN		WAPA/vernar, O1 WAPA/Folsom, CA
WN	WH WI	WAPA/Poisoni, CA WAPA/Redding, CA
WN	WJ	
		WAPA/Tracy, CA
XA	CT N2	WT/Washington, DC NNSA/Tokyo, JA
		NNSA/Tokyo, JA NNSA/Paris, FR
XA XA	N6 N7	,
		NNSA/Vienna, AU
XA	N8	NNSA/Moscow, RS
XA	N9	NNSA/Albuquerque, NM
XA	XA	NNSA/Washington, DC and Germantown, MD
XA	XB	NNSA/HQ/Albuquerque, NM
XA	XC	NNSA/NA-15/Amarillo, TX
XA	XD	NNSA/NA-15/Oak Ridge, TN
XA	XF	NNSA/NA-15/Fort Smith, AR
XA	XG	NNSA/NA-40/Albuquerque, NM
XA	XH	NNSA/NA-26/Aiken, SC
XE	AA	NNSA/Amarillo and Pantex, TX
XE	AB	NNSA/Germantown, MD
XE	AC	NNSA/Eddy County, NM
XE	AK	NNSA/Kansas City, MO
XE	AL	NNSA/Albuquerque, NM
XE	AN	NNSA/Los Alamos, NM
XE	AO	NNSA/Oak Ridge, TN
XE	AP	NNSA/Livermore, CA
XE	AQ	NNSA/Ft. Smith, AR
XE	NB	NNSA/Las Vegas, NV
XE	NC	NNSA/Las Vegas, NV
XE	ND	NNSA/Andrews AFB, MD
XE	XR	NNSA/Amarillo and Pantex, TX
XE	XS	NNSA/Albuquerque, NM
XE	XT	NNSA/Kansas City, MO
XE	XU	NNSA/Los Alamos, NM
XE	XV	NNSA/Support and Test/Las Vegas, NV
XE	XW	NNSA/Livermore, CA
XE	XX	NNSA/Savannah River-Defense, Aiken, SC
XE	ZA	NNSA/Albuquerque, NM
XH	NA	NNSA/Andrews AFB, MD
XH	NT	NNSA/Austin, TX

	COMPETITIVE	COMPETITIVE
SUB-AGENCY	AREA CODE	AREA DESCRIPTION
XH	NV	NNSA/Las Vegas, Mercury and Nevada Test Site-Area 6, NV
XI	BA	NNSA/Berkeley, Livermore, Menlo Park and Oakland, CA
XI	BB	NNSA/Los Angeles, CA
XI	BC	NNSA/San Diego, CA
XI	BD	NNSA/Cambridge, MA
XI	BE	NNSA/West Bend, WI
XJ	OK	NNSA/Paducah, KY
XJ	ON	NNSA/Newport News, VA
XJ	OO	NNSA/Stanford, CA
XJ	OP	NNSA/Piketon, OH
XJ	OR	NNSA/Oak Ridge, TN
XJ	OS	NNSA/St Charles, MO
XJ	OT	NNSA/Pittsburgh, PA
XJ	XJ	NNSA/Oak Ridge, TN
XK	NS	NNSA/Aiken, SC
XL	PI	PN/Scoville, ID
XL	PN	PN/Pittsburgh, PA
XL	PS	PN/Schenectady, NY
XL	PV	PN/Lynchburg, VA
XM	SC	SN/Windsor, CT
XM	SL	SN/Lynchburg, VA
XM	SM	SN/Milton, NY
XM	SN	SN/Schenectady, NY
YM	YM	YM&RW/Las Vegas and Jackass Flats, NV

## 14.31 CHRIS Glossary

Important! This glossary is a composite of definitions, terms, and acronyms used within the context of the CHRIS, PeopleSoft HRMS 8.0 for US Federal government processes. It is not intended to replace or change existing statutory, regulatory, or office-specific descriptions or definitions. Please refer to Federal source documents for greater clarification, context and/or specific usage for Federal terms and definitions.

**Absence Without Leave (AWOL).** Absence without prior approval, a non pay status resulting from an agency determination that it will not grant any type of leave for a period of absence for which the employee did not obtain advance authorization or for which a request for leave has been denied.

Academic Discipline. An employee's major field of study. (Also referenced as Instructional Program and Major)

**Accession.** A personnel action that results in the addition of an employee to the rolls of an agency.

**Account Code.** A combination of the fund type and B&R code.

**Accredited Education.** Education above the high school level completed in a U.S. college, university, or other educational institution that has been credited by one of the accrediting agencies or associations recognized by the Secretary, U.S. Department of Education.

**Adjusted Basic Pay.** The sum of an employee's rate of basic pay, continued rate of pay, locality comparability payment, and/or special pay adjustment for law enforcement officers to which the employee is entitled.

**Adverse Action.** A personnel action considered unfavorable to an employee, e.g., removal, suspension, furlough, or reduction in grade or pay.

**Agency.** Any Department or independent establishment of the Federal government that has the authority to hire employees in the competitive, excepted, and senior executive services.

**Annuitant.** A person who receives an annuity.

**Annuitant CSA Number.** A unique number assigned by OPM for a retired employee.

**Annuitant Indicator.** A code used to indicate the status of an annuitant appointed to a position in the Federal civilian service. Text for the codes are as follows:

- 1 = Reemployed annuitant Civil Service/FERS
- 2 = Retired military officer receiving pay
- 3 = Retired military non-officer (enlisted) receiving pay
- 4 = Retired military officer receiving pay and a reemployed annuitant Civil Service
- 5 = Retired military non-officer (enlisted) receiving pay and a reemployed annuitant Civil Service
- 9 = Not applicable (none of the above)
- A = Reemployed Annuitant FERS
- B = Former Annuitant FERS
- C = Retired Officer/Reemployed Annuitant FERS
- D = Retired Officer/Former Annuitant FERS
- E = Retired Enlisted/Reemployed Annuitant FERS
- F = Retired Enlisted/Former Annuitant FERS

**Annuitant Offset Amount.** The gross monthly annuity a Federally retired employee receives.

**Annuity.** A payment made to a retiree (or to the designated survivor) based upon qualifying participation in a Federal retirement program.

Application Server. One or more Unix or Windows NT machines which allow clients to offload performance-sensitive transactions from the client.

**Applet.** Any small application, but in the context of the Web, the word has come to refer to small Java applications embedded directly in a webpage.

**Appropriation Code.** The fund type and B&R Code.

**Appointing Authority.** The basis that authorized the appointing officer to effect personnel actions on an employee.

**Appointing Officer.** A person having power by law, or by duly delegated authority, to make appointments.

**Approving Official.** Individual with the delegated authority responsible for signing the action(s) taken on an employee.

**AUO (Administratively Uncontrolled Overtime).** An increment of up to 25% of basic pay paid on an annual basis for substantial amounts of overtime work that cannot be controlled administratively and that are required on an irregular basis.

**Availability Pay.** A special form of premium pay fixed at 25% of basic pay (including locality pay) that applies to criminal investigators who are required to work, or be available to work, substantial amounts of unscheduled overtime duty based on the needs of the employing agency. Criminal investigators receiving availability pay are exempt from the minimum wage and overtime pay provisions of the FLSA and may not receive administratively uncontrollable overtime pay.

**Award.** A special payment to an employee for certain prescribed kinds of activities or accomplishments.

Bargaining Unit. Code used to identify employee's bargaining unit.

**Batch Processes.** Background programs in PeopleSoft applications. Batch processes perform operations—such as pay confirmation, deduction calculation, and so forth—on groups of records. You run these processes from the Process Scheduler.

Benefit Plan Type. Any category of benefit, such as health, life, or savings.

**Benefit Plan.** A specific benefit within a plan type. For example, FEGLI life insurance coverage for Basic Life, Options A, B, and C.

Branch of Military Service. Identifies, if any, military service in which the employee served.

**Break in Service.** The time when an employee is no longer on the payroll of an agency.

**Budget Category.** Numeric/alpha identification given to each category of positions.

**Business Rules.** Policies and procedures that govern the flow of work and place controls over how information can be manipulated.

**Calculation Rules.** Criteria for calculating benefits, including as-of dates for age, service premium, and coverage calculations; rounding rules; and minimum and maximum coverage amounts. Any number of program and plan combinations can use a single set of calculation rules.

**CAO** (Change of Appointment Office). Movement of an employee from the jurisdiction of one appointing officer in an agency to that of another appointing officer in the same agency. This usually involves a move from a position for which one personnel office provides service and maintains records to a position for which another personnel office in the same agency provides service and maintains records.

**Career Appointment.** Competitive service permanent appointment given to an employee, who has completed 3 substantially continuous, creditable years of Federal service.

Central Personnel Data File (CPDF). Three types of reporting made by agencies to the OPM include the Dynamic and Status files (quarterly and monthly, respectively) and Organizations covering a range of employee personnel/payroll data.

Certificate. A list of eligibles taken from an OPM register and submitted to an appointing officer for employment consideration.

**Certification.** The process by which the OPM, or an agency office with delegated examining authority, submits certificates to appointing officers.

**Change-To-Lower Grade.** (1) For positions under the General Schedule or under the same Wage Grade schedule, a change-to-lower grade changes the employee to a lower grade; and (2) When both the old and new positions are under the same type ungraded wage schedule or in different pay-method categories, a change-to-lower grade changes the employee to a position with a lower rate of basic pay.

**CHRIS.** The U.S. Department of Energy's official personnel system of record is called (CHRIS) Corporate Human Resource Information System. DOE's HR homepage on the web is also known as CHRIS.

**Citizenship Code.** Numeric indicator as to whether the employee is a U.S. citizen or a foreign national serving in the U.S. The codes are: (1) Citizen and (2) Other.

**Civilian Retiree.** A person who has retired from Federal Government civilian employment under a Federal Government-administered retirement system.

Class or Class of Positions. All positions that are sufficiently similar in (1) kind or subject matter or work, (2) the level of difficulty and responsibility, and (3) the qualification requirements for the work, to warrant similar treatment in personnel and pay administration.

**Classify.** To evaluate the duties and responsibilities of a position and assign a title, occupation series and grade.

**Client.** Primary user application workstation.

**CFR.** The Code of Federal Regulations.

**Combined Federal Campaign (CFC).** A vehicle used by Federal employees to contribute to a charity or charities of their choice.

**Commercial-Off-The-Shelf (COTS).** Equipment or software that is currently sold commercially to at least one customer.

**Competitive Appointment.** An appointment to a position in the competitive service following open competitive examination or under direct-hire authority. The competitive examination, that is open to all applicants, may consist of a written test, an evaluation of an applicant's education and experience, and/or an evaluation of other attributes necessary for successful performance in the position to be filled.

**Competitive Area.** For reduction-in-force, that part of an agency within which employees are in competition for retention. Generally, it is restricted by what is considered a "local commuting area."

**Competitive Level.** A level for reduction-in-force consists of all jobs in a competitive area which are so similar in all important respects that the agency can readily move an employee from one to another without significant training and without loss of productivity.

**Competitive Service.** All positions as defined by 5 USC 2102 in the Executive Branch of the Federal government are in the competitive service unless they are specifically excluded from it. Positions in the Legislative and Judicial Branches are outside of the competitive service unless they are specifically included.

**Competitive Status.** Basic eligibility for noncompetitive assignment to a competitive position. A person on a career or career-conditional appointment acquires competitive status upon satisfactory completion of a probationary period.

**Computer Aided Software Engineering (CASE).** A set of tools to help application developers complete software development or modification more quickly and accurately.

Consultant. One who serves in an advisory capacity to an officer or instrumentality of the government.

**Consultant Position.** A position requiring the performance of purely advisory or consultant services, not including the performance of operating functions.

**Conversion.** The changing of an employee from one appointment to another appointment in the same agency without a break in service of more than 3 calendar days.

**Cost-Of-Living Allowance (COLA).** An additional allowance payable to an employee at a location in a non-foreign area where living costs are substantially higher than those in the Washington, DC area.

**Coverage.** An employee's chosen benefit plan and coverage level; that is, what sort of benefit is provided as well as the value.

**Creditable Military Service.** The total number of years and months of military service that is creditable for annual leave accrual purposes.

**Current Year.** PeopleSoft term that refers to event maintenance processing.

**Data Field.** One particular field of information in an internal or external database.

**Data Row.** Contains the entries for each field in a table. To identify each data row uniquely, the system uses a key consisting of one or more fields in the table.

**Database.** A collection of data organized for rapid search and retrieval.

Database Server. Primary data storage and processing.

**Date Classified.** Date the Position Description is classified by the Personnel Office.

**Date Eligible to Retire.** Date an employee is eligible to optionally retire based on the combination of age and service that meets legal requirements.

**Default.** A standard value that populates a field unless another value is entered.

**Demotion**. (See Change to Lower Grade).

**Denial of Within Grade Increase.** The decision to withhold (not grant) a within grade increase to a GS/GM employee because of a determination that the employee's performance is not at an acceptable level of competence.

**Department Code.** The identification of the Organization code and its description.

**Detail.** A temporary assignment to a different position for a specified period when the employee is expected to return to his/her regular duties at the end of the assignment. This employee is considered for pay and strength count purposes to be permanently occupying his/her regular position. Unless the agency chooses to use an SF-50, a detail is documented with an SF-52.

**Detail Tree.** A tree that employs ranges of detail values under each node; you must manually specify the detail values.

**Dialog Box.** A small window/box that appears and prompts for data.

**Direct Hiring Authority.** OPM approved agency recruiting plans, which expedite recruitment of persons for appointment to positions in shortage occupations.

**Disability Retirement Pay.** (from a uniformed service) Money paid by a uniformed service for disability incurred in or the proximate result of performance of active duty.

**Disabled Veteran.** A person who was separated under honorable conditions from active duty in the Armed Forces performed at any time and who has established the present existence of a service-connected disability or is receiving compensation, disability retirement benefits, or pension because of a public statute administered by the Department of Veterans Affairs or a military department.

**Dual Compensation.** Payment for more than one civilian office involving a total of more that 40 hours a week.

**Duty Location.** (use definition from GPPA)

**Dynamic Tree.** Tree that takes its detail values—Dynamic Details—directly from a table in the database, rather than from a range of values entered by the user.

**Earnings.** Amount owed to an employee based on salary, hours worked, or other calculation routines, plus other types of compensation and holiday, annual/sick leave, and any other authorized pay.

**Earnings Code.** A code to define additional earnings based on authority and regulations of said position. (e.g., retention allowance, supervisory differential, AUO, availability pay, standby premium, etc.)

**Effective Date.** A method of dating information in your system. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect.

Employee Record Number. Number of actions done on an employee.

**Entry on Duty Date (EOD).** The date on which a person completes the necessary paperwork and is sworn in as an employee.

**Error Message.** A short message used in identifying what specific requirements were not met in order for an action to be processed.

**Ethnic Group.** A code that identifies the employee's basic racial and national origin category.

**Event Maintenance.** Management of ongoing enrollments during a plan year. Changes involving maintenance include new hires and re-hires, terminations, family status changes, and changes to benefits eligibility.

**Excepted Service.** As defined by 5 USC 2103 and 5 CFR 213, the Excepted Service consists of positions that are not in the competitive service or Senior Executive Service. Excepted service positions have been excepted from the requirements of the competitive service by law, Executive Order or OPM regulation.

**Executive Order.** A directive issued by the President.

**Executive Schedule (EX).** Compensation and pay plan used by the Executive Branch of the Federal government. Statutory pay limits are derived from several of the pay levels within this plan and imposed on the General Schedule and other existing pay plans throughout the Federal government.

**Expert.** A person with excellent qualifications and a high degree of attainment in professional, scientific, technical, or other field.

**Fair Labor Standards Act (FLSA).** In accordance with this law, positions are identified as being exempt or non-exempt from coverage. Non-exempt positions are covered and overtime worked will be computed at 1+ the normal hourly rate, up to a maximum of 1+ the hourly rate of a GS-10, step 1.

**Federal Employees' Compensation Act (FECA).** This law provides compensation and medical benefits to civilian employees of the United States for disability due to personal injury or disease sustained while in the performance of duty. A feature of this law provides for the continuation of pay (COP) without charge to leave for up to 45 calendar days due to disability and/or medical treatment following a traumatic injury. Employees file claims with the U.S. Department of Labor, Office of Worker's Compensation, which adjudicates the claims and compensates the employing agencies for the employee's pay and benefits during the claim period.

**Federal Employees' Group Life Insurance Program (FEGLI).** Generally, if the employee has Federal retirement coverage or is on a temporary appointment exceeding one year, he/she is eligible to participate in the FEGLI program. Once eligible, he/she is covered automatically for Basic Life Insurance and premiums will be deducted from gross salary unless coverage is waived. The program offers Basic Insurance coverage and three types of optional coverage: Option A (Standard), Option B (Additional), and Option C (Family).

**Federal Employees' Health Benefits (FEHB).** Generally, the employee is entitled to coverage by the FEHB program if appointed to a position with Federal retirement coverage or has been on the rolls on a temporary appointment for more than one year. The Federal employer shares the cost of the premium (about 75%); actual premiums depend on the plan selected. If under a temporary appointment, the employee pays both the employer and employee shares. If the position is part-time, the employee pays the employee share and a portion of the employer's share.

**Federal Employees' Pay Comparability Act (FEPCA).** This law provides a structure and methodology to determine and authorize locality-based pay adjustments to Federal employees in order to elevate their basic pay to 1/2004 14.31-6

be commensurate with private sector employees working in the same occupations in the same geographic localities. It also includes a feature to authorize agencies to make advance salary payments to attract candidates for open positions which have consistently been hard-to-fill in certain geographic areas.

**Federal Holidays.** The following ten holidays are observed as non-work days; without loss of pay or charge to leave:

- 1. New Year's Day January 1
- 2. Martin Luther King's Birthday Third Monday in January
- 3. President's Day Third Monday in February
- 4. Memorial Day last Monday in May
- 5. Independence Day July 4
- 6. Labor Day First Monday in September
- 7. Columbus Day Second Monday in October
- 8. Veterans Day November 11
- 9. Thanksgiving Day Fourth Thursday in November
- 10. Christmas Day December 25

Federal Insurance Compensation Act (FICA). Employee and employer contributions to Social Security.

**Federal Wage System.** The job-grading and pay system that applies to most trade, craft, and labor positions in agencies subject to 5 USC 5342. Pay is adjusted according to the rates paid by private industry for similar jobs in the same area.

**FEGLI Living Benefits Act.** Beginning 7/25/95, a Federal employee who is terminally ill may elect to receive a lump-sum payment equal to the full amount of basic life insurance only, or a limited portion designated in multiples of \$1000. An election to receive this benefit is irrevocable; the individual is considered terminally ill if his /her life expectancy is 9 months or less.

**File Server.** Central shared resources for client workstations.

**Foreign Education.** Education acquired outside of any state of the U.S., the District of Columbia, the Commonwealth of Puerto Rico, a Trust Territory of the Pacific Islands, or any territory or possession of the U.S.

**Frozen Service.** The total number of years and months of civilian and military service that is creditable in a CSRS component of a FERS employee.

**Full Position Management.** The choice CHRIS has made to drive our human resource system. Therefore, the position-related fields are grayed (unchangeable) in several of the Administer Workforce pages.

**Full-Time Work Schedule.** A full-time work schedule requires most employees to work 40 hours during the workweek.

**Furlough.** The placement of an employee in a temporary nonpay status and nonduty status (or absence from duty) because of lack of work or funds or for other nondisciplinary reasons.

**Gender.** Used to indicate gender.

General Schedule (GS). The GS graded pay system established under the Classification Act of 1949, as amended.

**GM Within Grade Increase.** An agency awarded increase in basic rate of pay, with no change in grade, to an employee who is covered under the PMRS termination provisions of PL 103-89.

**Grade.** A range of pay in a graduated scale that includes positions of different occupational groups. The work performed should be equivalent as to the level of difficulty and responsibility and the level of qualification requirements of the work. The levels are established and designated within a specific pay plan by law or regulation.

**Grade Retention Entitlement.** The right of an employee to retain for 2 years, for pay and benefits purposes, the grade of the position from which he/she was reduced.

**Graduate Education.** Successfully completed education in a graduate program for which a bachelor's or higher degree is normally required for admission. To be creditable, such education must show evidence of progress through a set curriculum, i.e., it is part of a program leading to a master's or higher degree, and not education consisting of undergraduate and/or continuing education courses that do not lead to an advanced degree.

**Graphical User Interface (GUI).** An icon-based user interface to a system.

**Handicap Code.** A code that identifies a type of physical or mental impairment that substantially limits one or more of an employee's major life activities.

**Health Benefits Code.** An alpha/numeric code that identifies each Health Benefit plan.

**Health Benefits Effective Date.** Date the health benefit plan goes into effect or the effective date of cancellation.

**High School Graduation or Equivalent.** Applicant has received a high school diploma, General Education Development (GED) equivalency certificate, or proficiency certificate from a State or territorial-level Board or Department of Education.

**Incumbent.** An employee currently assigned to a position.

**Indefinite Appointment.** One given a nonpermanent employee who is hired for an unlimited period of time.

**Injury Compensation.** The compensation and medical care provided to civilian Federal employees for disability due to personal injuries sustained while in performance of duty and due to diseases relating to this employment.

Instructional Program. An employee's major field of study (also referenced as Academic Discipline and major).

**Interim Geographic Adjustment (IGA).** An additional payment is made when official duty station is in an area where it has been determined that significant pay disparities and recruitment or retention problems exist.

**Intermittent Service or Intermittent Employment.** Service when an employee works on an irregular basis for which there is no prearranged scheduled tour of duty.

**Involuntary Separation.** A separation against the will of and without the consent of the employee, other than separation for cause on charges of misconduct or delinquency.

**Job Code.** Grouping of attributes of like jobs at a high level (one-to-many relationship).

**Key.** One or more fields that uniquely identifies each row in a table. Some tables contain only one field as the key, while others require a combination.

**Last Equivalent Increase (LEI).** Reflects the effective date of the last step received in grade or the last promotion, whichever is most current (does not include QSI). Used as the basis to establish an employee's WGI due date.

**Last Increase Date.** Date of which an employee receive a positive increase in pay.

**Law Enforcement Officers (LEOs).** Positions within the Federal government involving law enforcement. Under FEPCA, many of these positions are entitled to additional special pay.

**Leave - Annual.** Leave of absence with pay allowed for personal, emergency, and other purposes.

**Leave - Sick.** Leave of absence with pay allowed for employees when the employee is physically incapacitated for the performance of duties; receives medical, dental, or optical examination or treatment; or is required to give care and attendance to a member of his/her immediate family who is afflicted with a contagious disease.

**Leave Without Pay (LWOP).** A temporary nonpay status and nonduty status (or absence from a prescheduled tour of duty) granted at the employee's request.

**Life Insurance.** The group life, death and accidental dismemberment insurance available to Federal employees.

Locality Adjustment. An interim geographic adjustment, locality-based comparability payment, or special pay adjustment for law enforcement officers.

Major. An employees major field of study (also referenced as Academic Discipline and Instructional Program.

**Mass Transfer.** The movement of an employee with his/her position to a different agency when (1) a transfer of function or an organization change takes place, and (2) there is no change in the employee's position, grade, or pay.

Menus. List of processes or other program options.

**Military Service.** Identifies, if any, the branch of military service in which the employee served.

Mode. A system feature that sets the parameters for which records can be viewed or changed by the user.

**Module.** A unit of application within PeopleSoft covering a specific function with its own forms or pages (i.e., HRMS, Payroll, Benefits Administration, etc.).

MSPB. Merit Systems Protection Board.

**National ID (NID)**. Nine numeric digits assigned to an individual by the Social Security Administration. Also known as Social Security Number (SSN) and Taxpayer Identification Number (TID).

Nature of Action (NOA) Code. Indicates the type of personnel action being processed.

Nature of Action Description. Describes the NOA code.

**Nature of Action Effective Date.** The date the personnel action is effective.

**Noncompetitive Action.** An appointment or placement in a position in the competitive service that is <u>not</u> made by selection from an open competitive examination, and that is usually based on current or prior Federal service.

**Normal Line of Promotion (Career Ladder).** The pattern of upward movement from one grade to another for a position or group of positions in an organization.

**Not To Exceed (NTE) Date.** Types are as follows:

- 1. Appointment NTE Date: Indicates the length of time a person may serve in a position.
- 2. Classification Temporary NTE Date: Established temporary date that is used for a temporary classification of a unique position.
- 3. Health Benefits Renewal Self-Support NTE: Date when an employee's incapacitated child must be re-evaluated for care under employee's hospitalization coverage.
- 4. LWOP NTE Date: NTE date is the last day the employee is in leave without pay status. The employee is scheduled to return to duty the next workday.
- 5. Position NTE Date: Indicates the length of time a position is available for use.
- 6. Promotion NTE Date: Specific time for an increase in grade on a temporary basis.
- 7. Suspension NTE Date: Specific time an employee is to be on suspension. No salary is paid for the period.

Occupant of Position/Vice. Indicates new position or former occupant of a position.

**Occupational Series Code.** Designates a grouping of positions similar in work and qualification requirements. They are designated by a title and four digit number (e.g., the Accounting Series, GS-0510).

Official Forwarding Address. An employee's mailing address following separation.

**Official Personnel Folder (OPF).** The repository of a Federal employee's official documents related to personnel history.

Official Personnel Folder (OPF) Address. Indicates the address where the Official Personnel Folder is maintained

**OMB.** Office of Management and Budget.

**Open Season.** This term has several connotations as it relates to Federal benefits processing. For FEHB processing, it is generally the time period from mid-November through mid-December. For Thrift Savings Plan (TSP) processing, these are semi-annual and are generally held from May 15 - July 31 and November 15 - January 31. Open seasons for FEGLI or Retirement Plan Changes are infrequent and special notification from the OPM would be issued to all Federal employees should they occur.

**OPF Code.** Indicates where the OPF is maintained.

**OPM.** Office of Personnel Management.

**Organization Codes.** A subdivision of an agency to which an employee is assigned.

**Organizational Position Title Code.** Also known as Working Title.

**Outside The Register Appointment.** An appointment in the competitive service made under an agency's applicant supply system because either there is not a sufficient number of eligibles on the appropriate register or no competitive inventory exists. Agencies are also authorized to make temporary limited appointments outside the register at grades GS-12 and below.

Pages. Screens comprised of the fields in which users enter data.

**Components.** Refers to a group of screens within a PeopleSoft application that contains related information.

**PAR.** Personnel Action Request.

**PAR Status.** Where in the process the action is, i.e., requested, approved or processed.

**Parallel/Dual Entry.** Entry of the same data into more than one (usually two) systems during transition to a new system.

**Part-Time Service or Part-Time Employment.** Service when employee works on a part-time schedule, less than 40 hours per week, on a prescheduled regular tour of duty.

**Part-Time Work Schedule.** A schedule that requires an employee to work less than full-time, but for a specific number of hours (usually 16-32 hours per administrative workweek) on a prearranged scheduled tour of duty.

**Pay.** Types of "pay" are as follows:

- 1. Basic Pay: generally, the total amount of pay received during any one calendar year at the rate fixed by law or administrative action for the position held by the employee or judicial official prior to any deductions and not including any special payments or premium pay.
- 2. Gross Pay: total compensation earned by an employee, annuitant, or survivor of a judicial official prior to any deductions. Includes basic pay plus locality pay; availability pay (if any) for LEOs; special payments (if any); an annuity (if any); plus awards (if any).
- 3. Premium Pay: pay provided to an employee as a regular addition to basic pay (e.g., administratively uncontrollable overtime (AUO), availability pay, overtime, night differential, holiday pay, etc.).

**Pay Adjustment.** Any increase or decrease in an employee's rate of basic pay when there is no change in the duties or responsibilities of the employee's position. A pay adjustment may include a change in the step at which the employee is paid. A change in the pay system under which the employees is paid is also a pay adjustment.

**Pay Basis.** A code indicating the principal condition in terms of time, procedures or criteria, that serves as a basis for computing an employee's pay.

**Pay Calculation.** Formula that calculates an employee's gross to net.

Pay Calendar. Payroll processing cycle for a given pay group.

**Pay Confirmation.** Process in which the system updates all to-date cumulative totals on the database for earnings, deductions, and taxes for pay groups assigned to a given Pay Run ID.

Pay Frequency. Defines how often employees in a pay group are paid—weekly, biweekly, monthly, and so on.

Pay Group. A set of employees grouped together for payroll processing.

Pay Period. Established times when employees in a pay group are paid. Pay Periods are defined by their beginning and ending dates.

Pay Plan. A code that denotes the pay schedule under which an employee is paid, e.g., GS, SL, ST, EJ, WG, etc.

**Pay Rate Determinant (PRD).** A designation of any special factors that help determine an employee's rate of basic pay or adjusted basic pay.

**Pay Retention Entitlement.** The right of an employee to retain, under certain circumstances, a rate of basic pay higher than the maximum rate of the grade for the position occupied.

**Platform.** Database environment that applications run on.

**POI.** Personnel Office Identifier. Also known as Submitting Office Number (SON). Identifies the Federal civilian personnel office authorized to appoint and separate the employee, and, to the extent such functions have been delegated, to prepare personnel actions, maintain official personnel records, and administer programs for staff compensation, training and development, benefits and awards, and employee and labor relations.

**Populate.** The term used to describe the appearance of data in a given field.

**Position.** The officially assigned duties and responsibilities that make up the work performed by an employee.

**Position Classification.** The analysis and identification of a position and placing it under the position classification plan established by OPM.

#### Position Change.

1. A move by an employee to another position during the employee's continuous service under the same appointment within the same agency.

Also,

2. When the employee is entitled to grade retention and moves to another position at or between the retained grade.

**Position Date Created.** Date the position was created for use in the agency.

**Position Description (PD).** In accordance with OPM guidelines, an official description, authorized and approved by an agency official, describing duties and responsibilities to be performed. Position classification standards are used to describe the work, classify the work components by occupational series, and factors (e.g., supervisory control, scope, complexity, competencies required) are used to determine the grade level (i.e., salary range) for the position.

**Position Number.** A number that identifies an authorized position.

**Post Differential, Non-Foreign.** A differential payable to an employee at a location in a non-foreign area if conditions of environment differ substantially from conditions of environment in the contiguous United States and warrant its payment as a recruitment incentive.

**Post Differential Percent.** Additional compensation that may be paid to certain employees who work in Guam or the Northern Mariana Islands.

**Post-56 Military Deposit.** The OPM provides guidelines to Federal agencies on how to calculate and process these voluntary employee deductions from pay toward the employee's current retirement fund for those periods of eligible military service.

**Premium Pay.** Additional pay for overtime, night, holiday, or Sunday work and standby duty or administratively uncontrollable work.

**Previous Retirement Coverage.** An indicator of whether the employee has, at the time of most recent appointment to the Federal service, previously been covered by the Civil Service Retirement System or the Federal Employees Retirement System.

**Probationary Period.** The first year of service of an employee who is given a career or career-conditional appointment. During this period, the agency determines the fitness of the employee and the employee has no appeal rights.

**Promotion.** For positions under the same type job classification system and pay schedule, a promotion changes the employee to a higher grade level or makes permanent a Promotion NTE; or when the old and new positions are under different job classification systems and pay schedules, a promotion changes the employee to a position with a higher rate of basic pay or makes permanent a Promotion NTE.

**Provider.** An entity that provides one or more of the benefits your agency offers. For example, OPM has oversight authority for the FEHB and FEGLI programs and would be considered a provider. The Thrift Savings Board would be the provider for the Thrift Savings Plan.

Quality Step Increase (QSI). A step increase awarded to an employee for sustained high quality performance.

**Rate of Basic Pay.** The rate of pay fixed by law or administrative action for the position held by an employee before any deductions and exclusive of additional pay of any kind.

**Rating Level**. (Rating of Record Level). Performance rating prepared at end of annual appraisal period as defined in 5 CFR 430.208 and 5 CFR 430.303.

**Rating Pattern**. (Rating of Record Pattern). Summary level assigned to performance ratings as defined in 5 CFR 430.208(d) and 5 CFR 430.304(g).

**Realignment.** The movement of an employee and his/her position when (1) a transfer of function or an organization change occurs, (2) the employee stays in the same agency, and (3) there is no change in the employee's position, grade or pay.

**Reassignment.** Change of an employee from one position to another without promotion or change to lower grade.

**Record Definition.** Collection of fields identified in a table and their attributes.

**Recruitment Bonus.** A one-time payment of up to 25 percent of basic pay to an employee who is newly appointed to a hard-to-fill position.

**Reduction In Force (RIF).** Separation of an employee from his/her competitive level required by the agency because of lack of work or funds, abolition of position or agency, or cuts in personnel authorizations.

**Re-employed Annuitant.** A person retired under the Civil Service or Federal Employees Retirement System whose annuity continues after he or she is reemployed by the Federal Government.

**Reemployment Priority List.** A list of career and career-conditional employees an agency has separated because of (1) reduction-in-force, or (2) compensable injury or disability where recovery takes more than one year from the time the employee began receiving compensation.

**Reemployment Rights.** The entitlement of an employee to return to nontemporary employment after assignment to other civilian employment.

**Reinstatement.** Noncompetitive reemployment in the competitive service as a career or career-conditional employee of a person formerly employed in the competitive service who had competitive status or was serving probation when separated.

**Related Education.** Education above the high school level that has equipped the applicant with the KSAs to perform successfully the duties of the position being filled. Education may relate to the duties of a specific position of the occupation, but must be appropriate for the position being filled.

**Relational Database.** A relational database consists of a series of tables. These tables are made up of rows (horizontal) and columns (vertical), very much like the layout of a spreadsheet. Columns are the fields you see in pages as you work with PeopleSoft applications, and rows contain the entries you make in each field.

**Relocation Bonus.** A one-time payment of up to 25 percent of basic pay to a current employee who relocates to take a hard-to-fill position.

**Remark Codes.** Codes that cause the printing of pre-set text passages on a notice of action form. Some passages are general purpose and others are specific to the personnel action being processed.

**Resignation.** A separation action initiated by the employee to leave the Federal civil/service.

**Resignation ILIA.** A separation initiated by employee under circumstances that meet the definition of "involuntary separation."

Retained Grade Effective Date. Date employee became eligible or began receiving a retained grade and pay.

Retained Grade Expiration Date. Expiration date of an employee's retained grade and pay.

**Retained Rate.** A rate of pay above the maximum rate of the employee's grade that an employee is allowed to keep in special situations rather than having his/her rate of basic pay reduced.

**Retention Allowance.** The annual total dollar amount up to 25 percent of basic pay paid to an essential employee with unusually high qualifications or special skills in those cases where the agency determines that the employee would be likely to leave Federal employment if no allowance were paid.

**Retention Register.** A record of all employees occupying positions in a competitive level arranged by tenure groups and subgroups, and by service dates within the subgroup. It is used in a reduction-in-force to determine which employees are retained and which are separated or moved to other positions.

**Retirement.** Separation from the service when employee is eligible to obtain an immediate annuity. Types of retirement are:

- 1. Mandatory Retirement.
- 2. Disability Retirement.
- 3. Voluntary Retirement.
- 4. Special Option Retirement.
- 5. ILIA (In Lieu of Involuntary Action) Retirement.

**Retirement Coverage Code.** A code used to denote an employee's retirement coverage. The major ones include the following:

- 1. 1-Civil Service (CSRS)
- 2. K-Federal Employees Retirement System (FERS) and FICA
- 3. Foreign Service (FS) Not used in DOE
- 4. C-CSRS Offset
- 5. 6-CSRS Special (for LEOs)
- 6. M-FERS and FICA Special

- 7. 2-Social Security System
- 8. 4-None

**Retirement Deferred.** Retirement of a person age 62 or older with at least 5 years of civilian service who was formerly employed under the CSRS and then left Federal service or moved to a position not under a retirement system. An employee covered by FERS who separates after completing 10 years of service can also receive a deferred retirement upon reaching the FERS "Minimum Retirement Age" (55 to 57, depending on birthdate).

**Retirement Discontinued Service.** Retirement based on involuntary separation against the will and without the consent of the employee, other than on charges of misconduct or delinquency.

**Retirement ILIA (In Lieu of Involuntary Action).** Voluntary retirement initiated by employee in lieu of involuntary separation by the agency.

**Retirement - Optional.** Voluntary retirement, without reduction in annuity, of an employee who meets minimum age and service requirements.

**Return to Duty.** Placement of an employee back in pay and duty status after absence for furlough, suspension, or leave without pay.

**Roles.** A component of PeopleSoft's workflow functionality. A role is a class of users who perform the same type of work, such as clerks or managers.

**Routings.** A component of PeopleSoft's workflow functionality. Routings are the system's means of moving information from one place to another, from one step to the next. Routings specify where the information goes and what form it takes - i.e., e-mail messages, electronic form, or worklist entry.

**Row.** A portion of the database also referred to as a record.

**Rules.** A component of PeopleSoft's workflow functionality. Rules determine what activities are required to process your business data.

Run ID. Code that uniquely identifies a Run Control for batch programs.

**Sabbatical.** An absence from duty, without charge to pay or leave, that an agency may grant to a SES career appointee to engage in study or uncompensated work experience.

**Salary.** Rate of compensation received by an employee.

**Scientific and Professional (ST) Positions.** Positions established to carry out research and development functions that require the services of specially qualified personnel. ST positions are ungraded.

**Seasonal Employee.** An employee who works on an annual recurring basis for periods of less than 12 months (2087 hours) each year.

**Self-Service Center.** A place where employees go (usually a Web browser-accessed application) that gives them more direct control over their own data to verify, update, and/or request certain personnel actions.

**Senior Executive Service.** Positions that are classified above GS-15 of the General Schedule or in level IV or V of the Executive Schedule or equivalent positions.

**Senior Level (SL) Positions.** Positions established to replace positions at grades GS-16, GS-17, and GS-18 of the General Schedule. SL positions are classified above GS-15 of the GS and are ungraded.

**Server.** Any computer that performs tasks based on a request from a remote client.

**Service Computation Date (SCD).** The date, either actual or constructed by crediting service, used to determining benefits that are based on how long the person has been in the Federal Service.

Shift. Specific hours during the day that an employee works, such as nine to five, four to eleven, or ten to six.

**Shift Code.** Numerical shift identifier that is unique within a Set ID.

**Shift Differentials.** A premium over regular pay for which employees on certain shifts may be eligible, such as double-time for late night shifts. Shift differentials are usually stated as an additional rate or factor.

**Sick Leave.** Sick leave is accrued by full-time permanent/seasonal employees at the rate of 4 hours every biweekly pay period; for part-time permanent/seasonal employees, it is accrued at one hour for every 20 hours worked.

**Social Security Number.** Nine numeric digits assigned to an individual by the Social Security Administration. Also known as a Taxpayer Identification Number (TIN) and National ID (NID).

**Special Salary Rates.** Higher salary rates for specific grade levels and occupational groups determined by OPM for employees working in specific geographic areas. Each area is assigned a separate Schedule Number.

**SQL.** Structured Query Language - a set of commands used to report from, write to, and extract data from relational databases.

**SQR.** Structured Query Report. A tool used to create a wide variety of reports or to perform global database manipulations and interactive queries.

**Standard Form (SF).** A standardized form for interagency use by the Federal government. The SF prefix is the most common but not exclusive in usage.

**Standard Form (SF-50).** Notification of Personnel Action. Used to notify employee and the payroll office, and to record the action in the employee's Official Personnel Folder.

**Standard Form (SF-52).** Request for Personnel Action. Used by operating officials and supervisors to request personnel actions and to secure internal agency clearances.

Status Position Code. A code that identifies the various conditions of a position, e.g., frozen, classified, etc.

**Step.** A secondary level or subcategory within the primary pay level (depending upon pay plan, different employees may have a different number of steps within their primary pay level).

**Supervisory Differential.** The annual total dollar amount paid to a General Schedule supervisor who provides direct, technical supervision over the work of one or more civilian employees in other pay plans who receive a higher rate of total pay than does the supervisor.

**Suspension.** Placement of an employee, for disciplinary or other reasons, in a temporary nonpay and nonduty status for disciplinary reasons or other reasons pending an inquiry.

**Tables.** The structure that establishes the foundation of information in a relational database.

**Target Grade.** Highest obtainable grade for a position.

**Temporary Appointment.** An appointment made for a limited period of time and with a specific not-to-exceed (NTE) date determined by the authority under which the appointment is made.

**Temporary Continuation of Coverage (TCC).** The TCC program, as prescribed by the OPM, requires Federal agencies to provide to separating Federal employees the opportunity to temporarily continue their FEHB coverage for up to 18 months (unless involuntarily separated because of gross misconduct), provided the individual pays the full cost of coverage, including both the employee and government share and a two percent administrative charge. Agencies may elect to provide this service in-house or enter into cross-servicing agreements with another Federal agency.

**Tenure.** The period of time an employee may reasonably expect to serve under his/her current appointment.

**Web Architecture.** Where data storage and processing are distributed to process across different systems, such as the Application Server; Web Servers and report repositories which centralizes much of the data processing, thereby eliminating the load upon the individual web browsers.

**Thrift Savings Plan (TSP).** A voluntary retirement savings and investment plan for Federal employees administered by the Federal Thrift Investment Board.

**Tool Bar.** The bar of icons found across the top of every screen.

**Tour of Duty.** The hours of a day (daily tour of duty) and the days of an administrative workweek (weekly tour of duty) that are scheduled in advance and during which an employee is required to perform work on a regularly recurring basis.

**Transaction Code.** Identifies what action has taken place against the position.

**Transaction Number/Sequence.** More than one action with the same effective date.

**Transfer.** A change of an employee, without a break in service of one full workday, from a position in one agency to a position in another agency that can be filled under the same appointing authority.

**Translate Table.** A system edit table that stores codes and translate values for the miscellaneous fields on the database that do not warrant individual edit tables of their own. In most cases, PeopleSoft maintains the Translate Table.

**Travel and Relocation Date.** Length of time an employee must remain in the Government after the Government has paid to relocate him/her from one official duty station to another or for initial appointment.

**Two-tier Architecture.** Where data storage and processing takes place on a central server (called the Database Server) and business rules and presentation of the data are managed by the individual client workstations.

**Type of Appointment.** Indicates the specific type of appointment under which the employee is serving.

**Unemployment Compensation.** An unemployment insurance for Federal employees.

United States Code (USC). Codifies the laws and regulations of the United States.

**Veteran.** A person who was separated with an honorable discharge or under honorable conditions from active duty in the Armed Forces performed during one of the periods described in 5 USC 2108.

**Veterans Preference.** An employee's category of entitlement to preference in the Federal service based on active military service that terminated honorably.

**Wage Area.** A geographical area within which a single set of regular wage schedules is applied uniformly by Federal installations to the covered occupations under the Federal Wage System.

**Wage Employees.** Federal wage employees or prevailing rate employees. These employees are in trades, crafts, or labor occupations covered by the Federal Wage System and their pay is fixed and adjusted from time-to-time in accordance with prevailing rates.

Waiver of an OPM Qualification Standard. Involves setting aside requirements in a published standard to place an employee in a particular position, usually to avoid some kind of hardship to the employee, such as in cases of RIF or administrative error on the part of the agency. Extra training and/or skills development may be needed to help the employee adjust to the new position. Waivers are granted by OPM or an agency, as appropriate, on a case-by-case basis, and do not directly affect other positions in the organization.

Web Server. A computer that responds to requests from clients and provides the clients with the requested document and its contents.

**Web Server Architecture.** Technology allowing the network of computers to enable a database to reside in one location on a server and still be accessed simultaneously by multiple users (web) at various remote sites.

**WGI Due Date.** Identifies the date of an employee's next within grade increase. Current policy is that the step increase is implemented on this date automatically unless prevented by the processing of an unsatisfactory performance appraisal or excess of allowable leave without pay.

WGI Non-Creditable Days. Total number of days that cause the WGI due date to be adjusted forward.

Web Browser. Basic screen structure of CHRIS.

Within Grade Increase (WGI). An increase in employee's rate of basic pay by advancement from one step of his or her grade to the next after meeting requirements for length of service and performance.

**Without Compensation (WC).** Under certain circumstances an agency may be authorized to appoint an employee to provide services to the government without pay.

**WIP.** Work-In-Progress.

**WIP Status.** The code that tells the PeopleSoft workflow system when and where to send data to the next step of the request/approval or other type of cycle.

**WIP Status Type.** The code that tracks the action. Each WIP Status is linked to a WIP Status Type. PeopleSoft delivers four different Status Types:

Work-In-Progress - A request that has not reached the final level of approval.

Canceled - Cancels an action that had been completed.

Corrected - HR corrects a completed request.

Completed - HR approves a request that has successfully completed all review levels.

Work Schedule. The time basis on which an employee is paid. A work schedule may be full-time, part-time, or intermittent.

# 15 CHRIS Help

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### 15.1 CHRIS Hotline

## **Functional Support**

Functional support should be directed to your HR Power User first. The HR Power User at each site has been trained the most extensively and should have the greatest knowledge of the system at that specific site. If the Power User cannot solve your problem, then the Power User should contact the CHRIS Functional Hotline by telephone (304) 285-1310 or preferably by e-mail <a href="mailto:CHRISFunctional@netl.doe.gov">CHRISFunctional@netl.doe.gov</a> (it is not case sensitive). Submit all questions/issues to this address instead of a specific individual. The e-mail will be simultaneously received by three members of the CHRIS Functional staff for response. When submitting a question/issue, it is very important to include specific information such as Emplid, effective date of the action in question, detailed information on the issue, and when the action was entered. By using this central e-mail address, delays in answering questions and problems can be avoided when one of the hotline representatives is absent.

Example: An example of functional support would be if you are having problems saving an action or you can't find the appropriate salary table, or you can't find the position number you set up. You may be having problems maneuvering through the system. Functional support deals directly with making the action work in the system.

## **Technical Support**

Technical support should always be communicated through your IMPOC. Your IMPOC should be contacted first and if further assistance is needed, the IMPOC personnel can contact the technical support team at NETL via e-mail (<u>CHRIS@netl.doe.gov</u>), phone (304) 285-4729 or fax (304) 285-4282.

Example: An example of technical support would be problems getting into the CHRIS system such as unable to logon, unable to print, etc.

### **CHRIS Homepage**

To find out the latest news about CHRIS, check out the homepage at http://chris.inel.gov. Information such as DOE phonebook, what's new, help, PeopleSoft users, etc., are located on this homepage. You can even reach OPM at the touch of a click. Check it out for handy HR information located on one homepage.

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### 15.2 CHRIS User Accounts

## **Employee Access (HR/Training Workflow Requests)**

Federal employees assigned to an agency that has implemented CHRIS Workflow can request an employee account. To do so, log on to your Employee Self-Service (ESS) account at web address <a href="https://mis.doe.gov/ess/">https://mis.doe.gov/ess/</a>. Once logged on, click on **Update**, then click on **Request CHRIS Workflow ID**. Ensure your e-mail address is correct, then click on the **Request Workflow ID** button. Your Workflow user ID and password will be sent to you by e-mail, usually within a couple business hours (Eastern). Note that Security Administration is on an Eastern Time Zone schedule

## **Approver Access (HR/Training Workflow Requests)**

Employees (Approvers/Managers) responsible for approving HR or or Training Workflow requests must complete the online Workflow User ID Request form, <a href="http://chris.inel.gov/Workflow/workflow\_request.cfm">http://chris.inel.gov/Workflow/workflow\_request.cfm</a>. Fill in the form, click the Create Request button, then print the form, and read and sign the security agreement. Present the signed form to the Workflow point(s) of contact (POC) in your local HR or Training department. The POC will add your employee ID, identify your approval role(s), sign as the authorizing agent, and fax the form to the CHRIS Security Administrators for processing. Your workflow user ID and password will be sent to you by e-mail, usually within a couple business hours (Eastern).

### **Administrative Access**

Administrative access is granted to users whose jobs require them to maintain DOE employee data in support of HR, Benefits, Training, and Manage Competencies, SF 52 Personnel Data Tracking, or Standards of Conduct\* functions. Such users must complete the online User ID Request form, <a href="http://chris.inel.gov/HR\_Admin/user\_id\_request.cfm">http://chris.inel.gov/HR\_Admin/user\_id\_request.cfm</a>. Requestors must fill in the form, click the Create Request button, then print the form, and read and sign the security agreement. Present the signed form to the HR, Training, or Manage Competencies point(s) of contact (POC)\*, as applicable, in your local HR or Training department. The POC will add your employee ID, identify your approval role(s), sign as the authorizing agent, and fax the form to the CHRIS Security Administrators for processing. Your user ID and password will be sent to you by e-mail, usually within a couple business hours (Eastern). NOTE: If you are a Workflow and Administrator user, all your access requirements will be granted through a single user ID.

\* The only POC for the Standards of Conduct System is in the HQ Office of the General Counsel (GC). GC has a user ID request form specific to the Standards of Conduct system.

### **Points of Contact**

The HR Director (or equivalent) in each subagency is responsible for designating Points of Contact for each of the HR (includes Benefits and SF 52 Data Tracking), Training, or Manage Competencies functions they maintain. The CHRIS/PeopleSoft Security Administrator will provide HR POC guides to those so designated. The guides identify HR POC responsibilities and procedures.

If there are any questions, contact the CHRIS Technical Staff at (304) 285-4729 (voice) or (304) 285-4282 (fax).

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